ZyFIND Manual

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About ZyFIND

ZyFIND is a powerful and robust program that allows you to search, find and organize all documents that are in your ZyLAB archives.

Search

With ZyFIND, you can perform detailed searches for your documents. Because all documents are full-text indexed by ZyINDEX, you can search for any word or combination of words. ZyFIND supports all search techniques that are also available in the search engines that you find on the Internet. After your search, a result list displays the documents sorted by relevance.

Find

A big difference exists between searching and finding. ZyFIND provides a unique feature—called “hit highlighting”—that helps you find the information you looked for, immediately. Hit highlighting marks the words you where looking for in the original scanned or electronic document. You can see right away if this document is the one you are looking for. ZyFIND enables you go directly to the page where the hit appears, which saves you time, especially if your hit is on the last page of a lengthy document.

Organize

After you have found the information you are looking for, you can start organizing your data. Of course, ZyLAB offers organizing capabilities at the point of input, but in many cases, you’ll want to organize on the fly. Therefore, ZyLAB offers different techniques to label, structure and organize your data at different times. You can manually change or add additional indexes (key fields) to the document or add a hierarchical structure to your documents. With this flexibility, you are better able to find a particular document the next time you open your ZyLAB archive. All of your colleagues will also be able to use the structure you added to the documents.

Analyze

Using ZyView in combination with ZyLAB Analytics Server lets you run on-the-fly analysis of the found document, including data extraction and translation (depends on the Job Definition and Job Profile setup in Analytics Server).

Distribute

After you find the document you are looking for, you can view it or send it by email, print the document, or export the document to another archive or even another application.

ZyFIND Options

Go to ZyFIND > Options > Global Settings, to define some basic settings.

Global

- Text Editor (browse to select the text editor)
- Enable Statistics Logging (will only take effect after restart)
- Functional Security enabled (change from ZyINDEX/Security)
- Cascade Windows
- Always view PDF files with Adobe

Directories

- Index list directory (browse to select the correct directory)
- Index root directory (browse to select the correct directory)
- Users directory (browse to select the correct directory)

Search preferences

- Reload last open index at startup
- Allow search tools to be set (when selected, you can (de)select search tools via View > Search tools. At startup the selected search tools will be loaded.)
- Turn-off drive mapping
- Depending on the *update index automatically after field edit* setting, the index will be automatically updated after a field edit operation. If this option is disabled, then all documents that are modified are stored in a temporary database of the index so they may be updated all together at a later time.
- Allow indexed results only
  With the Database Fields module, multiple indexes can be linked to one database. In a scenario where field information is first registered in xml fields, after which the document is being scanned (with barcode and primary key), it is possible that the document linked to the xml fields is not yet processed. In order to find the information in the fields, it is possible to search the fields, without them being

linked to an (indexed) document. This is not always useful. To turn off this option, select "Allow indexed results only".

- Maximum number of search results
- Maximum number of search-terms (default is 1.000.000. Only increase this after receiving too many (3065 max) wild card limit errors. Modification will only take effect after a restart.)

Table of contents

If you want to change a Table of Contents that is located on a network, make sure *Broadcast updates in the table of contents* is on. Restart before making changes.

ZyFIND Tools

Document Basket

Conditions

You have searched one or more indexes in ZyFIND. You want to collect your documents in a Document Basket.

Instructions

1. Select a document from the available search results.
2. Click the Add to Basket button.

   or, click the right mouse button and select Add to Document Basket.
3. The documents you added to the Document Basket are shown in a separate window, once you click the Open Document Basket button .

> All functionalities available in ZyResult can also be used here.

Result

You have collected documents from several result pages in a Document Basket.

Transliteration Assistant

The Transliteration Assistant enables you to search translated and/or original documents for transliterated parts (letters/words represented in the corresponding characters of another alphabet). The Transliteration Assistant is used primarily to search for names of individuals and locations. For example, Pravda.

Search for transliterated text

1. Open ZyFIND.
2. Go to File > Select Index(es).
3. Select an index with translated documents.
4. Click OK.
5. Go to Tools > Transliteration Assistant.
6. If you want to change the Language, click the Select Language button.
7. Select 'latin2arabic.xml' or 'latincyrillic2.xml' and click Open.
8. Enter a search query, using your keyboard or mouse.

   Add an * to make sure all occurrences of your search query are found.
9. To add only the Latin(/Diacritic) or Arabic/Cyrillic search query, choose the radio button Latin(/Diacritic) or the radio button Arabic/Cyrillic.
   To add both the Latin(/Diacritic) and Arabic/Cyrillic search query, choose the radio button Latin(/Diacritic) and Arabic/Cyrillic.
10. Add the search query by clicking Insert.
11. Click Search.
    The search results will be shown in ZyResult.

Re-use search queries

Select the History tab to re-use old search queries. Select a query and click Insert.

Search Assistant

You can use the Transliteration Assistant, or Search Assistant, also in your WebClient.

1. Go to C:\Inetpub\wwwroot\<indexname>\styles
2. If you are using the default templates, open user.css in Notepad.
3. Change the following line:

   ```
   #search_assistant { display: none; }        /* only for specialized applications */
   ```

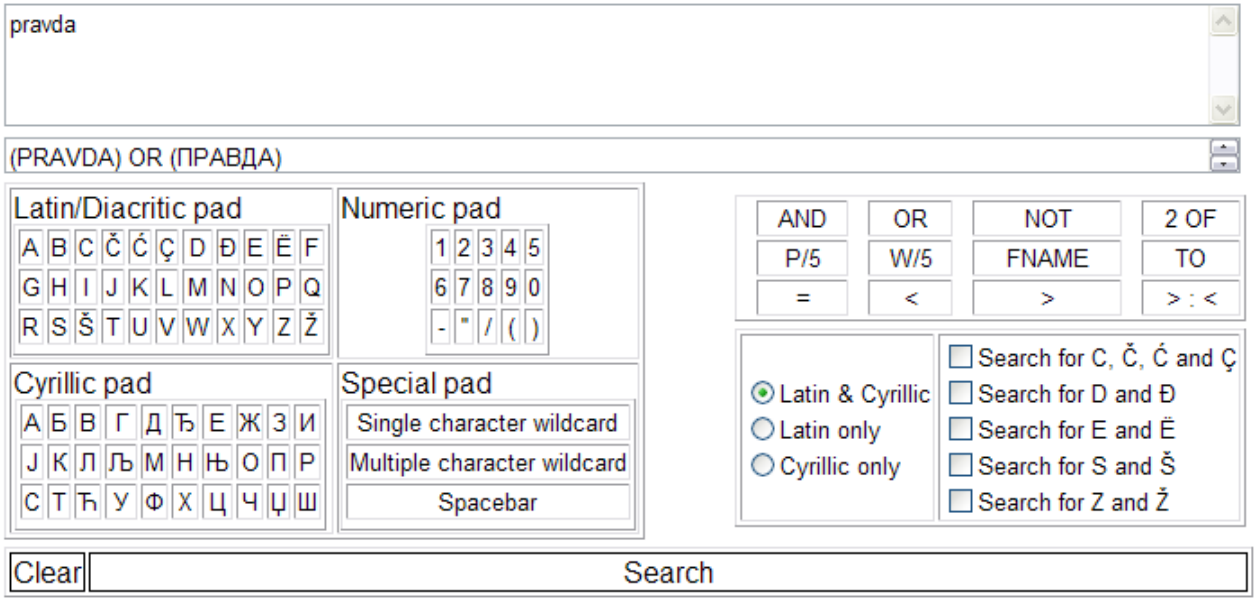
   to

   ```
   #search_assistant { /* display: none; */ }        /* only for specialized applications */
   ```

4. Save and close the file.
5. Open your WebClient.

6. Click Search Assistant .

Below you see an example of a search query where the Latin and Cyrillic versions are combined with boolean OR. The Latin (left) query part is expanded so that D variations are also searched for automatically.



Multi-index Batch Search

The ZyLAB Multi-index Batch Search module allows you to search in more than 100 plain indexes, or 50 indexes using XML-wrapper module, sequentially in one batch. This Search module is accessed from the ZyFIND window.

During the actual search, a progress dialog keeps you informed about which index is currently being queried and the number of documents found so far. You can cancel the query at any time, and only the results found up to that point will be shown.

When the search is complete (or cancelled), a query result list is shown containing the file or files in which the 'hits' for the word, phrase or string appear. Double-click a file to open it in ZyVIEW. In ZyVIEW, use the navigation tools in the Navigate toolbar to view the hits.

Conditions

Indexes are available.

Instructions

1. Open ZyFIND.
2. In the ZyFIND menu bar click *Tools* > *Multi-index Batch Search*. The Multi-index Batch Search module opens.
3. On the *Indexes* tab, select which indexes you want to search. You can select all indexes by pressing ctrl+A and selecting one index in the list. You can select multiple adjacent indexes by clicking and dragging the mouse over the indexes you want to select, then selecting one index in the list.
4. On the *Query* tab, enter your query text and select the settings

   The functionality of the options and settings is the same as in ZyFIND.

5. Click *Search*. ZyFIND Multi-index Batch Search searches the selected indexes, and displays the progress in a separate progress window. Errors are also shown in the progress window, and a reminder message about the errors appears when the search is complete.

   If you want to stop a search click *Cancel*. The items found up to that time are displayed in the results.

   Searching many large indexes can take a long time.

6. The results are shown in a ZyRESULT window.

Result

Multiple indexes have been searched. The found items can be opened in ZyVIEW.

Search for information

After you have built an index, you can search for information in the files of your index. You can search using ZyFIND, ZySEARCH or ZyLAB Webserver (the Web Portal).

First, select one or more index(es). Now, you can start full-text searching. To enhance your searches, choose from several search tools and search techniques. The search tools and search techniques are described for ZyFIND but most are also applicable to ZySEARCH and/or the Web Portal. The Web Portal has its own help.

Full descriptions are in the following sections:

- **Select index(es)** (page 9)
- **Full-text searching** (page 15)
- **Search tools** (page 17)
- **Search techniques** (page 29)
- **Command line** (page 30)
- **Multi-index Batch Search** (page 7)

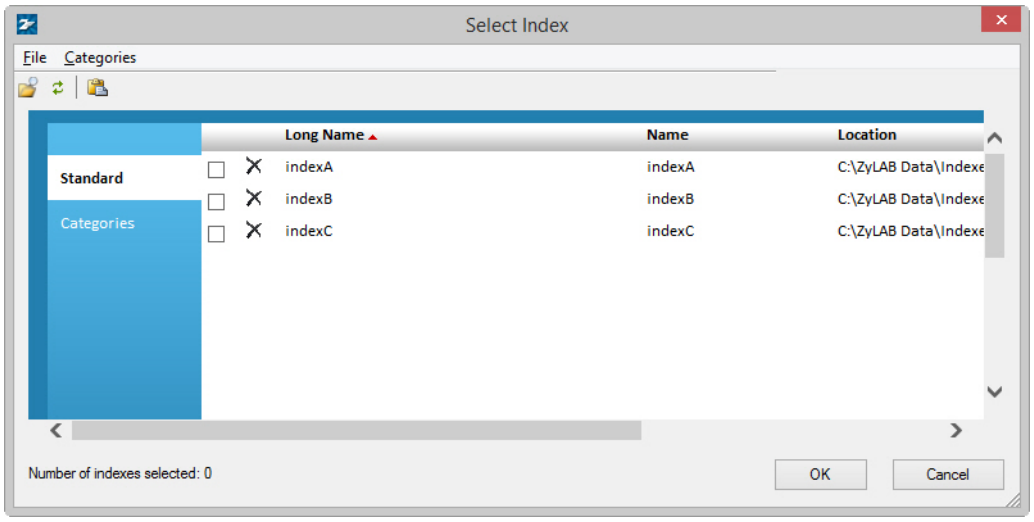
Select index(es)

Conditions

ZyFIND is open.

Instructions

1. Go to File > Select Index(es).
   The Select Index dialog appears.



2. Select Standard, or a group of indexes (Annotations, Audit Trail, Categories, or scenarios).

   You can **Add an index to the list** (page 10), **Remove an index from the list** (page 11), **View not available indexes** (page 12), and **Create and edit categories** (page 13).

   Scenarios: When an index is created based on a scenario (see Create an index template and Create an index based on a template in the ZyINDEX Manual) an extra group with the name of that scenario will appear in the Select Index dialog. Every index that is created based on that scenario will be stored in a group with the name of that scenario.

3. Select one or more indexes.
4. Click OK.

Result

You have selected one or more indexes. Now you can enter your search statement.

Note

Selected indexes that contain an Annotations or Audit trail module will show one or two more icons. One of the icons is the TOC view, the other contains the search options for that particular module.

Add an index to the list

Conditions

The Select Index dialog is open. You can access this dialog via ZyFIND (File > Select index(es)), or via ZyINDEX (File > Open).

Instructions

1. Click the Add Index button .
2. Browse for the index you want to add. Click Add.

   Or

   Use the lower part of the dialog to search for the exact location of an index.

   a) Browse to select a drive or disk.
   b) If desired, select Include subfolders.
   c) Click Search.
   d) Select an index from the list.
   e) Click Add selected.

Result

You have added an index to the list.

Remove an index from the list

Conditions

The Select Index dialog is open. You can access this dialog via ZyFIND (File > Select index(es)), or via ZyINDEX (File > Open).

Instructions

Click the ✕ icon of the index you want to remove.

Result

The index is removed from the list. Only the link is removed, the index still exists. If required, it can be added to the index list again.

View not available indexes

Conditions

The Select Index dialog is open. You can access this dialog via ZyFIND (File > Select index(es)), or via ZyINDEX (File > Open).

Instructions

Click the Rescan indexes button .

Result

All indexes that are not available at this time, turn red.

Note

Not available indexes are, for example, moved indexes or indexes that are on a network drive with which there is no current connection.

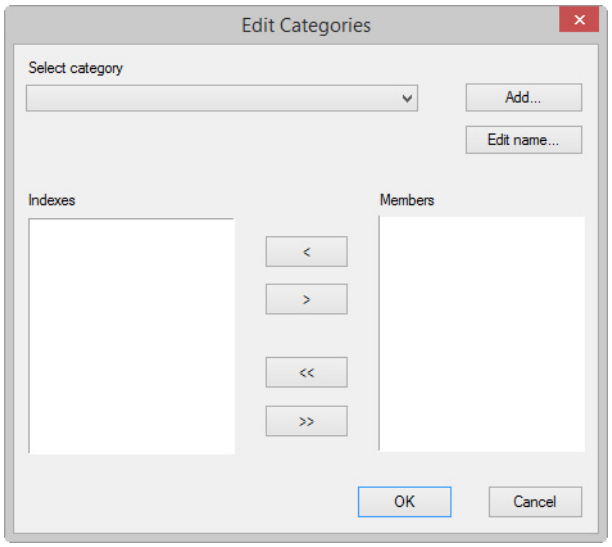
Create and edit categories

Conditions

The Select Index dialog is open. You can access this dialog via ZyFIND (File > Select index(es)), or via ZyINDEX (File > Open). You want to create or edit a category (set of indexes), to be able to select all required indexes at once. This removes the risk of forgetting one.

Instructions

1. Click the Edit Categories button . The Edit Categories dialog appears.



2. Select a category from the dropdown list.

   Or

   Click Add. Enter a name for your category and click OK.
3. Use the arrows to (de)select the indexes you want to include to or remove from the category. You can work with all indexes that are listed in the Select Index dialog.
4. Click OK.

Result

You have created or edited a category. Click Categories in the Select Index dialog to view and select categories.

Note

- Use the Edit name button to change the name of a category.
- Even in a category the indexes can be selected or deselected individually. Click the icon on the right side of the category: , to view and (de)select the included indexes.
- Indexes that are created using a *scenario* in ZyINDEX are all stored in the same tab that has the name of the used scenario.

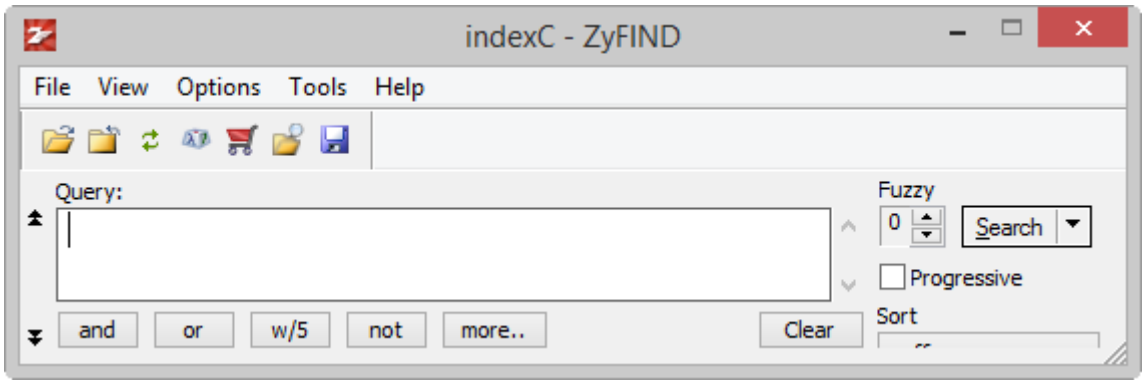
Full-text searching

Conditions

ZyFIND is open.

Instructions

1. Enter a word (query) in the *Query* text box.



2. Select the 'and, 'or', 'w/5', 'not' or 'more..' button to create a more complex search query.

> and, or, not: see Boolean operators: AND, OR, NOT
> w/5, w/25, p/5, to: see Positional operators: Context related
> 2of: see Quorum operator
> fdate: The file modification date of a file can be searched with the fdate operator.
> fname: The file name of a document can be searched with the fname operator.
>
> For more information, see **Search techniques** (page 29).

3. Specify the Fuzzy degree (the degree of closeness to your query).

> For TBIE indexes, use Fuzzy Search in your search query with a tilde ~. For each word in your search query you can assign a different fuzzy degree. For example, 'car~1 transportation~3'. For more information, see Fuzzy searches.

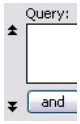
4. If you executed a search already, and want to search in the last results, select Progressive.
5. Click Search.

Result

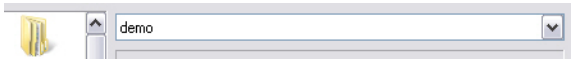
The search results are listed in ZyResult.

Note

- You can save a (complex and/or long) query via File > Save Query to File (define a name, and click Save). Reuse this query, via File > Open Query from File (select the correct file, click Open).
- Use the arrows at the left side of the screen to minimize or maximize your search possibilities.



- The settings of the Search tools may defer, depending on the settings of the index. If you selected two or more indexes, select the correct tools by selecting an index from the dropdown listbox.



- Click the arrow button (next to Search), if you want to determine a search method (other than the standard ZyFIND Query, where ZyFIND will look for search operators, wildcards, brackets, etc., in your query):

  - All Words (AND operators are inserted automatically between the words)
  - Any Word (OR operators are inserted automatically between the words)
  - Exact Phrase (all words are automatically put in quotes)

Search tools

To enhance your searches, use one or more Search tools.

Use the search tools to reduce the number of results that must be reviewed. Almost any kind of search can be made, from exploring (to get a sense of the available information) to very precise searches.

Search tools are:

- **Contents: Locate documents** (page 18)
- **Contents: Search marked folders** (page 20)
- **History: Reuse or delete previous searches** (page 21)
- **Vocabulary: Find related documents** (page 22)
- **Thesaurus: Include synonyms** (page 23)
- **Concepts: Predefined complex queries** (page 24)
- **Fields: Meta information** (page 25)
- **Reference: Help** (page 28)

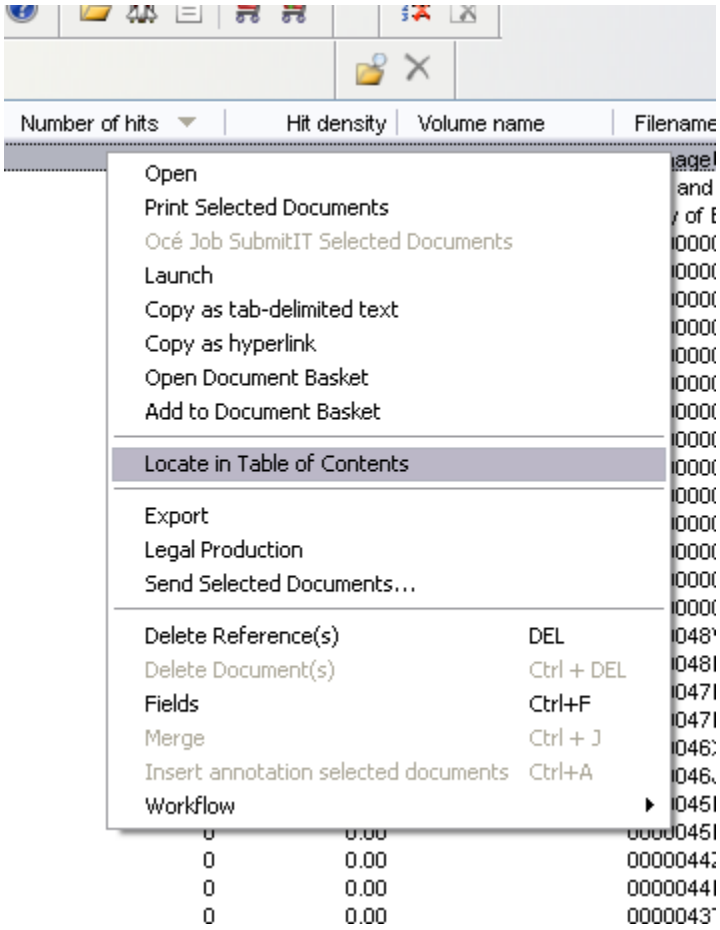
Contents: Locate documents

Conditions

ZyFIND is open. You have done a search and the results are listed in ZyResult. You would like to know whether similar or related documents are available. These documents might be located in the Table of Contents. However, the Table of Contents is large and you are not familiar with its hierarchical structure.

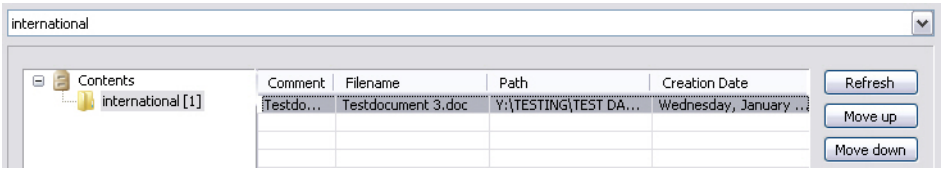
Instructions

1. Select a document from the result list.
2. Click the right mouse button.
3. Select Locate in Table of Contents.



Result

If the document is present in the Table of Contents, the location will be shown.



Note

- You can also locate a document in ZyVIEW. Click the 'Locate in table of contents' button: . You can navigate through multiple occurrences of the document with 'Locate Next in Table of Contents'.
- If you want to create or edit a Table of Contents, see **Contents: Structure your documents** (page 45).

Contents: Search marked folders

Conditions

ZyFIND is open. You have entered a search query and want to restrict your search to documents in marked folders of the Table of Contents.

Instructions

1. Select a folder from the Table of Contents.
2. Click the right mouse button.
3. Go to Search folders, and select one of the following options:
   - Mark 'selected folder' for searching
   - Mark 'selected folder' and subfolders for searching
4. Select the Search button.

Result

You have searched only the folders that were marked.

Note

- To deselect all marked folders, select Search folders > Unmark all folders.
- If you want to create or edit a Table of Contents, see **Contents: Structure your documents** (page 45).

History: Reuse or delete previous searches

If you cannot remember a successful previous search, look it up in History and reuse it. Delete unsuccessful searches.

Conditions

ZyFIND is open.

Instructions

1. Click the History icon:

. A list with previous searches (max. 100) appears.
2. Double click a previous query to reuse it.

   If added to a query, you can replace the automatically inserted search operator 'or' with your own.
3. Select a previous query and click Delete to remove it.

Result

You viewed, reused and/or deleted previous searches.

Vocabulary: Find related documents

View all searchable words and find all related documents.

Conditions

ZyFIND is open.

Instructions

1. Click the Vocabulary icon:

. A list with all searchable words appears.
2. Scroll through the list, view the number of occurrences for each.
3. Double click a word to insert it in the Search dialog.

   If added to a query, you can replace the automatically inserted search operator "or" with your own.
4. Click Search.

Result

You viewed all searchable words and searched on one to find all related documents.

Thesaurus: Include synonyms

Broaden the scope of your search statement and include synonyms.

Conditions

ZyFIND is open.

Instructions

1. Type a search statement.
2. Click on a word in your search statement.
3. Click the Thesaurus icon to look for synonyms:

.
4. View the available synonyms and the number of occurrences for each.
5. Double click synonyms to add them to your search statement.

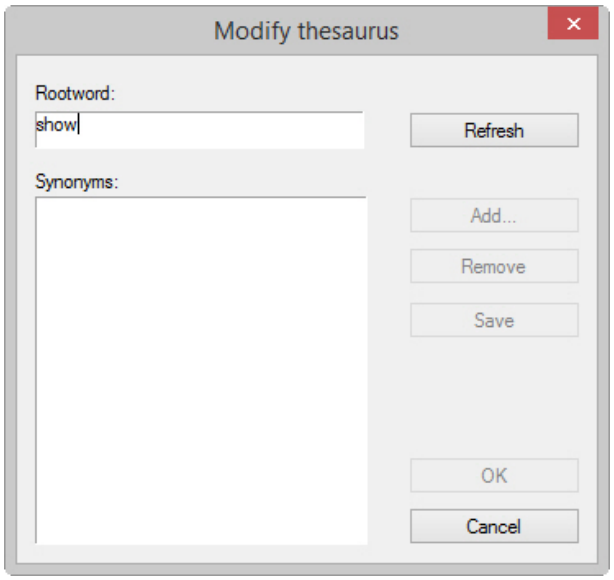
> You can replace the automatically inserted search operator "or" with your own.

Result

You added synonyms to your search statement.

Note

Customize the standard thesaurus with Edit. Add synonyms to a root word, or delete them. Only custom synonyms can be deleted.



Concepts: Predefined complex queries

Concepts are (complex) search statements with a name. Define often repeated searches as concepts and save them for later use. For example, a concept named "legal" could be defined as:

lawyer OR **justice** OR **rechtsanwald** OR **advocaat** OR **court**

Conditions

ZyFIND is open.

Instructions

1. Click the Concepts icon:

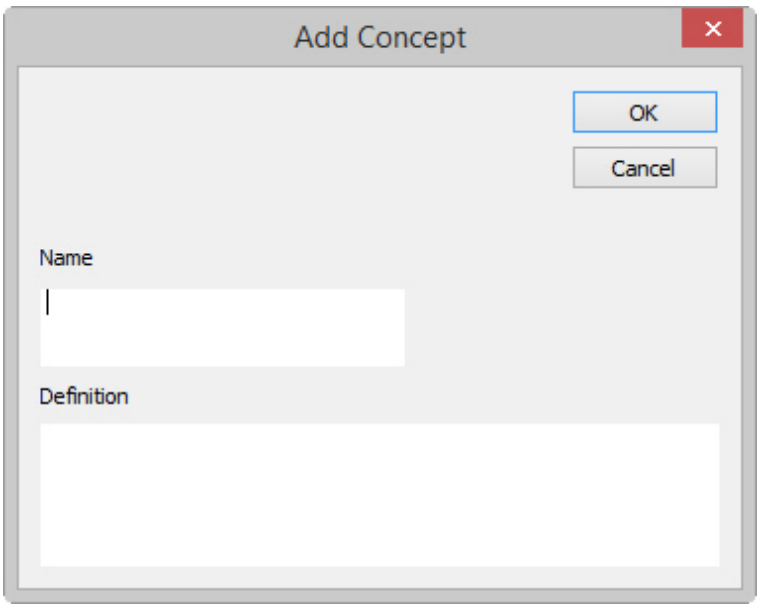
.
2. Search for a concepts in the index related, private or public folders.
3. Double click to insert a concept.

Result

You added a concept to your search statement.

Note

- Click Add to add concepts (fill out a name and definition (search statement)).



- Click Modify to change the definition of a concept.

Fields: Meta information

Search for information **about** your documents. For example, author or description.

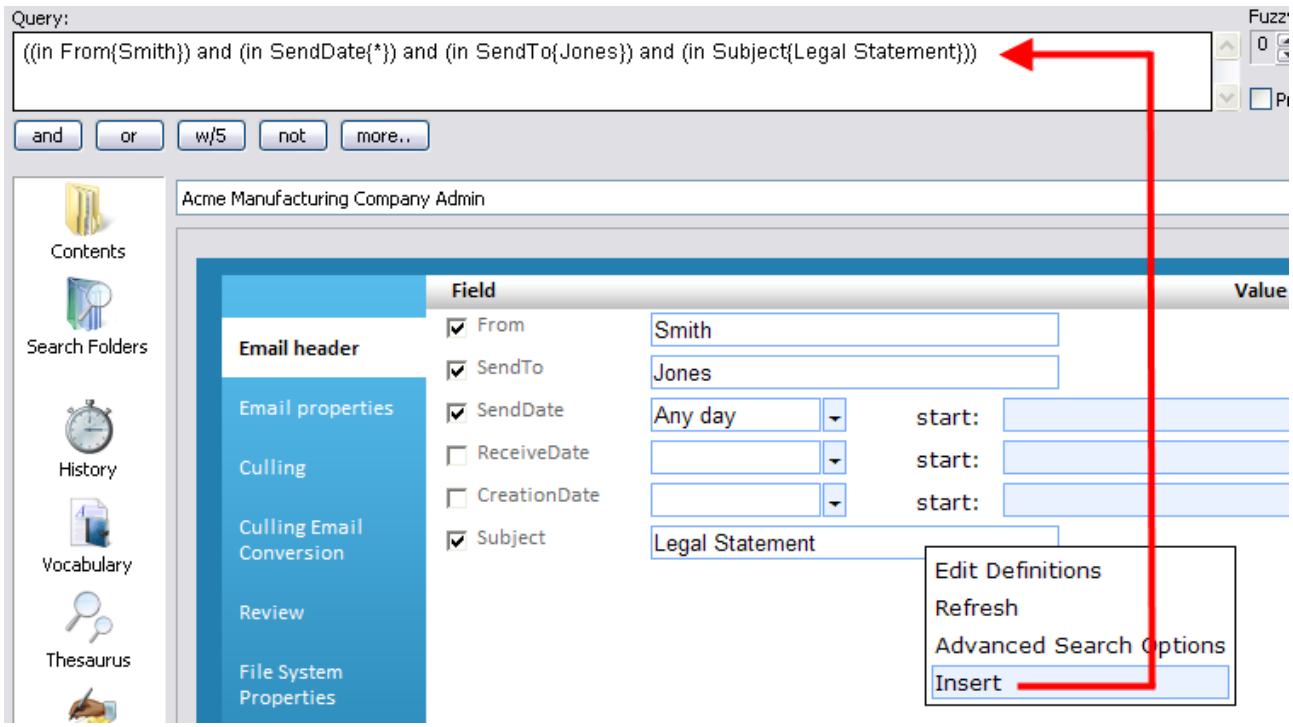
Conditions

ZyFIND is open.

Instructions

1. Click the Fields icon:

.
2. Select the field(s) you want to search on.
3. Type a field value, select one from a list or calendar, or leave it empty.
4. Optionally, if you want to search the field contents on a number of field values, and edit the search query before executing it, you can use this option. Define the field values you want to search on, click the right mouse button and select 'Insert'. All values are inserted in the full text query box. Edit the search query and execute the search.



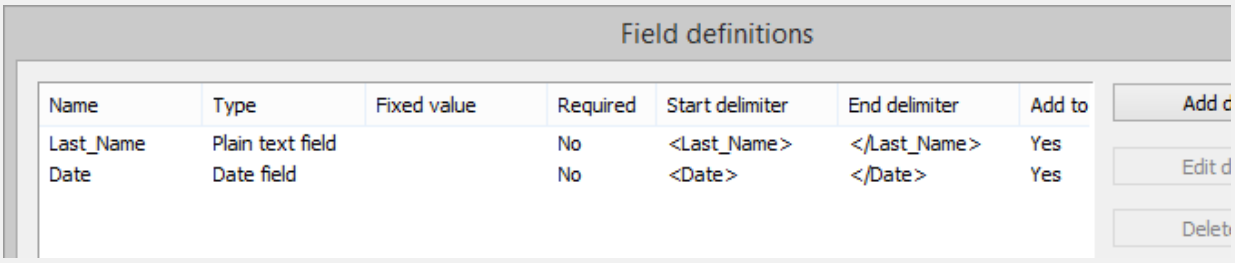
Fields can be inserted if:
- Show as search field (Client tab) is checked
- Field storage type is either Document, Document Catalog or Xml Wrapper (Storage & Index tab)
- Document Catalog and XML Wrapper fields will only be inserted if:
  TBIE: 'Duplicated/cached' or 'Full text searchable' is checked
  HAPI: 'Full text searchable' is checked

You can check this via Edit Definitions.

Search XML Wrapper fields
If you want to search on fields to get a result list with all populated or empty field values of a specific field, make sure you search an XML Wrapper index with XML Wrapper fields and the option 'Full text searchable' selected in the Storage & Index tab (of the New Field Definition dialog).

Select the Fields icon, click the right mouse button and select Edit Definitions. Use the Id (delimiter) of a field to define a search query.

Query syntax: <delimiter> to "/<delimiter>" {}



For example:
name to "/name" {john} will return all documents with the value john in the name field
name to "/name" {*} will return all documents with values in the name field
name to "/name" {} will return all documents with empty values in the name field

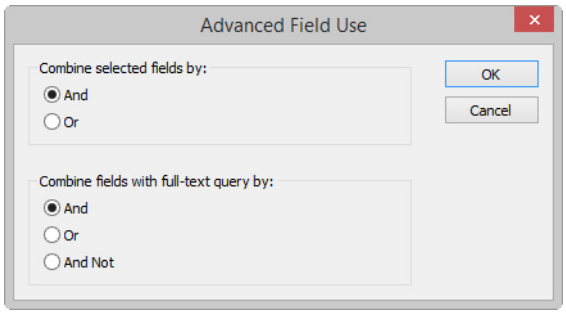
5. Click Search.

Result

A list of results appears in ZyResult.

Note

- Use Refresh to remove all field values.
- Use Advanced Search Options to define the and/or operators:



- Change the look of Fields by choosing a different template.
  a) Click the right mouse button.
  b) Select Edit Definitions.
     The Field Definitions dialog appears.
  c) Select Advanced settings.
     The Advanced Field View Settings dialog appears.
  d) Choose a different template for View/edit values and Query values. Use the VerticalPluginsTab template to group and store the field definitions underneath one tab. Select Show undefined fields, to show all fields (including the ones of which the field values are not defined).
  e) Click OK twice.

For more information on Field Definitions, see Add fields.

Reference: Help

Click Reference: Reference, if you want help with defining your search statement. For more information, see **Search techniques** (page 29).

Search Techniques

Use Search techniques to reduce the number of results that must be reviewed. Almost any kind of search can be carried out, from exploring (to get a sense of the available information) to very precise searches.

The search techniques are described in the ZyLAB Search Language Guide.

Command line

The Command Line feature allows you to start and run ZyFIND using the Windows Run feature.

Go to Start > Run. The Run dialog box appears, with the Command Line text box active. Type this information into the box to start ZyFIND.EXE:

Path to the shareable files, e.g.

“C:\Program Files\ZyLAB\Information Management Platform\bin\”

Executable program file, e.g.

ZyFIND.EXE

Command line parameters such as:

-i[ShortIndexName, ShortIndexName2, (etc.)] - Specifies the list of short index names that will be opened for searching

-q[query] - e.g. -q["in fieldname{value}"]

-f[fuzzy level, minimum percentage correct] - the search method

-p - progressive search

-v - start ZyVIEW immediately when only one result is found in ZyRESULT

-m[0-3] - 0 = regular search, 1 = search all words, 2 = search any word, 3 = search exact phrase

A typical command would appear like this:

“C:\Program Files\ZyLAB\Information Management Platform\bin\ZyFIND.EXE” -i[index1, index2] -q[ZyLAB] -f[1,80] -v -m[0]

To find all documents with the word ZyLAB in index1 and index2 with a fuzzy level of 1 for words longer or equal than 5 characters, regular search.

Search Performance

Due to fragmentation (inefficient use of storage space) of indexed files the search performance may slow down. In order to avoid that, it is advised to schedule defragmentation (physically organizing the contents of the disk to store the pieces of each file close together and contiguously) on a nightly basis.

Disk Defragmenter is a computer program included in Microsoft Windows designed to increase access speed by rearranging files stored on a disk to occupy contiguous storage locations.

The techniques used by the Disk Defragmenter are as follows:

1. Moving all the index or directory information to one spot. Moving this spot into the center of the data, i.e. one third of the way in, so that average head travel to data is halved compared to having directory information at the front.
2. Moving infrequently used files further from the directory area.
3. Obeying a user provided table of file descriptions to emphasize or ignore.
4. Making files contiguous so that they can be read without unnecessary seeking.

In Windows Vista, Disk Defragmenter includes an option to automatically run at scheduled times using Task Scheduler.

Work with documents

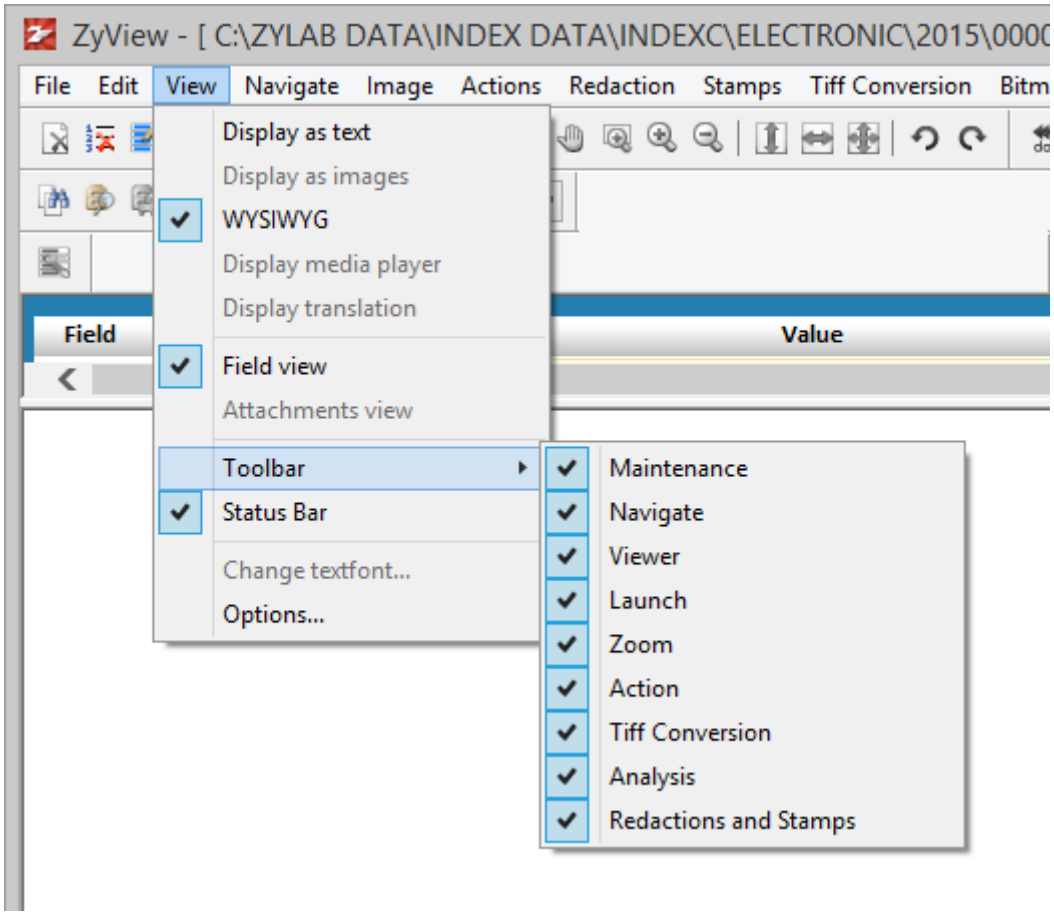
After you have found the information you were looking for, you can work with your documents. **View** (page 33), **Organize** (page 44), **Customize** (page 63), and **Share** (page 91) your documents, using ZyFIND, ZyRESULT and ZyVIEW.

Enter a search statement in ZyFIND and click Search. A result list appears in ZyResult. Double click an item to view it in ZyVIEW.

View

ZyVIEW allows you to view the contents, as well as the fields, bookmarks and/or attachments of a file (text, image or with hit highlighting). You can view files with a bookmarks pane on the left, a field pane on the top and an attachments pane at the bottom.

All viewing options can be selected through menu options and buttons in toolbars. Enable/disable toolbars via View > Toolbar.



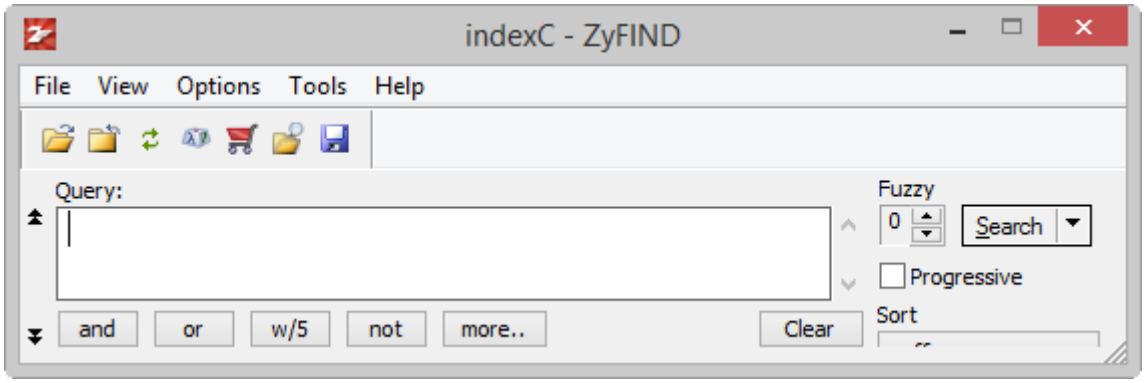
The following topics describe the viewing functions:

- **View the result list (statistics)** (see "**ZyRESULT List View**" page 35)
- **ZyResult - Keyword in context (KWIC) view** (see "**ZyRESULT - KWIC View**" page 36)
- **Viewing a Pdf document with Adobe Reader** (see "**ZyRESULT - PDF View**" page 37)
- **Navigation Buttons** (see "**ZyVIEW - Navigation Buttons**" page 38)
- **Viewer Buttons** (see "**ZyVIEW - Viewer Buttons**" page 39)
- **Image Buttons** (see "**ZyVIEW - Image Buttons**" page 40)
- **Launch Buttons** (see "**ZyVIEW - Launch Buttons**" page 42)

ZyFIND View

Go to ZyFIND > View, to define some basic settings.

- View Log File, to open an error logging file (if it exists).
- Always on top, to place ZyFIND always on top of your other programs. If you use ZyFIND in a small window this can be very convenient.



- Search tools (when this option is not available, go to Options > Global Settings > Search Preferences tab, and select the option "Allow search tools to be set"), when selected, you can (de)select search tools via View > Search tools; the selected search tools are loaded at startup.
- Show toolbars (to show or hide the toolbars).

ZyRESULT List View

The result list functions like lists in other windows applications, for example, the list of e-mail items in your Outlook inbox folder. The results are displayed in a list control, which consists of the following columns:

- Rank
- Number of hits
- Hit density
- Volume name
- Filename
- Links
- Bookmark
- Path
- Time/date
- Short description
- Comment
- Index
- Guid (Globally Unique IDentifier)
- Email Content
- Has Email Attachments

The result list provides standard file information from the operating system such as document filename, on which volume it is stored, in which directory, file date, etc.

Search statistics and file information is standard for any document in the result list. Next to this standard information, ZyRESULT also displays document fields if such fields are present. The presence of these fields allows you to quickly disseminate the results and determine which results may be more important than others.

In the footer of the ZyRESULT window the amount of documents in the result list, the total amount of hits in the documents and the sorting method are available.

You can save the Result list using File Save (as..). Define a name, and click Save. Open it using ZyFIND > File > Open Result File (select the correct file, and click Open).

ZyRESULT - KWIC View

In KWIC (keyword in context) view, the context of the (first) hit is shown. The hit is highlighted.

KWIC view is available via ZyResult > View > Kwic view, via an icon on the toolbar or with the shortcut CTRL + K.

Go to ZyResult > View > Options to define the KWIC view settings:

- Define the maximum number of contexts and the number of words (max 50) around the keyword.
- Select the Display mode: Compact or Separated. Compact displays all contexts one after the other, Separated displays all contexts on a separate line.

ZyRESULT - PDF View

If documents were indexed with Adobe Reader they will not be displayed with ZyVIEW but instead *Adobe Reader* will be launched for document viewing. A special module has been developed that provides hit highlighting, hit navigation and bookmark support from within Adobe Reader or Adobe Acrobat.

Conditions

A PDF document created with Adobe Acrobat has been indexed. Adobe Reader is installed on your computer. ZyRESULT is open.

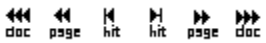
Instructions

1. Double click the PDF document.
2. The document will be automatically opened in Adobe Acrobat.
3. Use the Hit buttons to jump from hit to hit.

Result

You have viewed a PDF document with Adobe Reader.

ZyVIEW - Navigation Buttons

Navigation buttons in ZyVIEW	Results
	Previous document/page/hit, and Next hit/page/document

ZyVIEW - Viewer Buttons

Viewer buttons in ZyVIEW	Results
Display as text	Displays the text file containing the OCR text and image links of an image document exported by ZySCAN or any other filter indexed as type ASCII.
Display as images	Displays images and shows hit-highlighting on the hits in the image.
WYSIWYG	Displays electronic file contents with hit highlighting. In this view it is also possible to copy selected text to the windows clipboard. This may be useful to reuse a particular paragraph of the OCR text in a document.
Display media player	Displays file in media player.
Display translation	When a file has been translated using ZyLAB Analytics Server, this displays the original document in a new ZyVIEW window.
Fieldview	Activates the field view frame above the text/image/hit highlighting view.
Attachments view	View attachments. For electronic documents with attachments. Attachment view is located below the text/image/inso view panel.

ZyVIEW - Image Buttons

Image buttons in ZyVIEW	Results
	Select an area. You can use it to copy and past an area in for instance Word, or to select an area to highlight as an annotation or hyperlink area.
	Grab and drag
	Select area and zoom in
	Zoom in
	Zoom out
	Adjust image to height
	Adjust image to width
	Adjust image to height and width of the viewing frame
	Rotate left
	Rotate right

If you want to change font (style) and size, go to View > Change textfont. If text from another codepage is being viewed, this is particularly useful.

Go to ZyVIEW > View > Options to select the following options as required:

- Allow exit on escape
- Synchronize Text- and Image Contents
- Lock selected View
- Goto First Hit (to jump directly to the first hit when opening a document)
- Print Hits on Images
- Allow deleting of document
  This option must be selected if you want to delete pages in a document.
- Display next document after delete
- Edit fields in main window (to edit field (values) in Field View. For more information, see **Editing Field values** (page 69)).
- View TIFF Converted documents first

- Go to File > Properties to view the location, name, type, size, other document properties and image links.
- Click the right mouse button to select Image Properties (filename, type, compression, resolution, size, WHYIWYG version).

ZyVIEW - Launch Buttons

Launch buttons in ZyVIEW	Results
	Print
	Launch
	About
Open .xml file	Is only enabled if an xml document is found that matches the filename of the txt file. Typically this is an xml file that was generated by ZySCAN. A browser is launched and the xml can be viewed. In Internet Explorer 5.0 and higher, xml is parsed and the document structure can be browsed as an xml document.
	Open Document Basket
	Add to Document Basket

ZyVIEW - View Email

Conditions

When searching an Email Archive, you want to view if an email contains an attachment, or is an attachments itself.

Instructions

1. Open and search an Email Archive in ZyFIND.
2. Make sure that, in ZyRESULT, the option Hide Attachments (View > Email) not is selected.
3. Open an email.
4. If, in File View, you view:
   - an icon with paperclip, the email contains an attachment.
     Click on the icon, to view the attachment (child email).
   - an icon without a paperclip, the email itself is an attachment.
     Click on the icon, to view the email (parent email).

Result

You were able to view whether or not an email contained an attachment, or was an attachment itself.

Organize

Organize your documents by structuring them within a Table of Contents, adding bookmarks (notes) and labeling them with fields.

You can use the traditional way of archiving, i.e. by organizing document references. It is easy to have document references to the same document in different folders, therefore it provides a very intuitive and flexible method to organize your information from different perspectives.

ZyFIND offers several search tools to add structure to your documents:

- **Contents** allows you to structure your documents. You can use the traditional way of archiving, i.e. by organizing document references. It is no problem to have document references to the same document in different folders. So, it provides a very intuitive and flexible method to organize your information from different perspectives.
- **Fields** that are fully searchable can be added to label your documents.

ZyResult allows you to view and manipulate results of a query.

ZyVIEW can be used to edit fields and add bookmarks to lines of text on specific pages.

The following topics describe the organizing of documents:

- **Contents: Structure your documents** (page 45)
- **Fields: Label your documents** (page 54)
- **Link between documents** (see "**ZyRESULT - Link between documents**" page 57)
- **Document Basket: Collecting Documents** (see "**Document Basket**" page 4)

Contents: Create Table of Contents

Use Contents to structure your documents. Drag and drop documents from the Result list to your (automatically generated or personal) Table of Contents. Double click a reference (to a document) to open it.

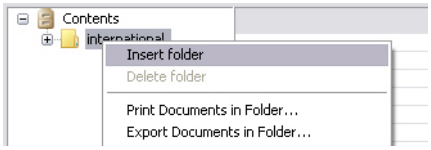
Conditions

ZyFIND is open.

Instructions

1. Click the Contents icon:

.
2. Right click the mouse on your Index then select Insert folder.



3. Type a suitable name for the folder and press enter. Add more folders as required.
4. Drag and drop documents to the folders from the Result list (of course, first search the index!).

> A personal table of contents is not index-specific and can contain references to documents from different indexes.
>
> It is possible to drag and drop references from the index-related table of contents to a personal table of contents and vice versa. It is not possible to drag and drop a reference from a personal table of contents to an index table of contents of another index. This also allows copying between different table of contents.
>
> References in the personal table of contents to indexes that are not selected are inactive, denoted by their gray color. The reference may be activated by selecting the index associated with that reference.

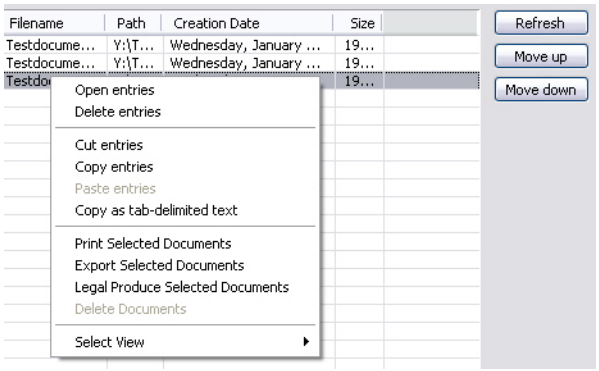
5. Select Refresh to update the contents of the folder. Use the Move up and Move down buttons to order your documents.

Result

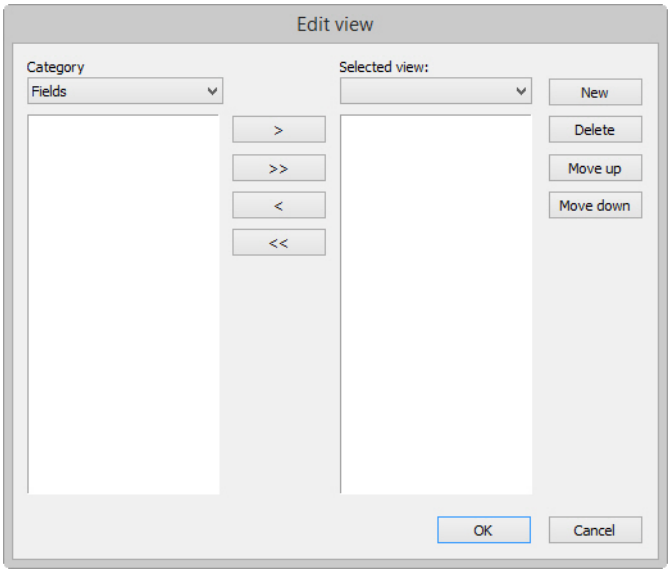
You created a personal Table of Contents, added documents and structured them.

Note

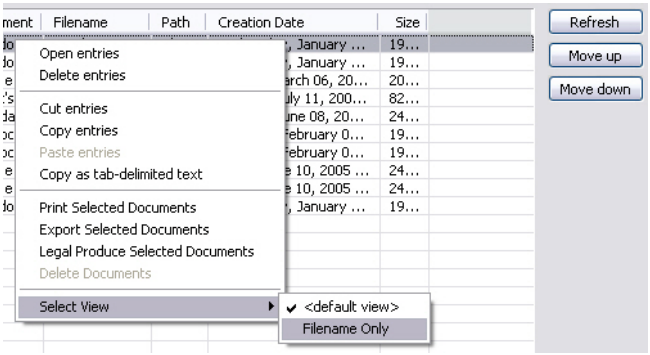
- If you want to change a Table of Contents that is located on a network, make sure Broadcast updates in the table of contents is on. Go to Options > Global Settings > Table of contents tab to verify. Restart before making changes.
- Select a reference (to a document) in the Table of Contents and click the right mouse button for more options. For example, Open entries and Print Selected Documents.



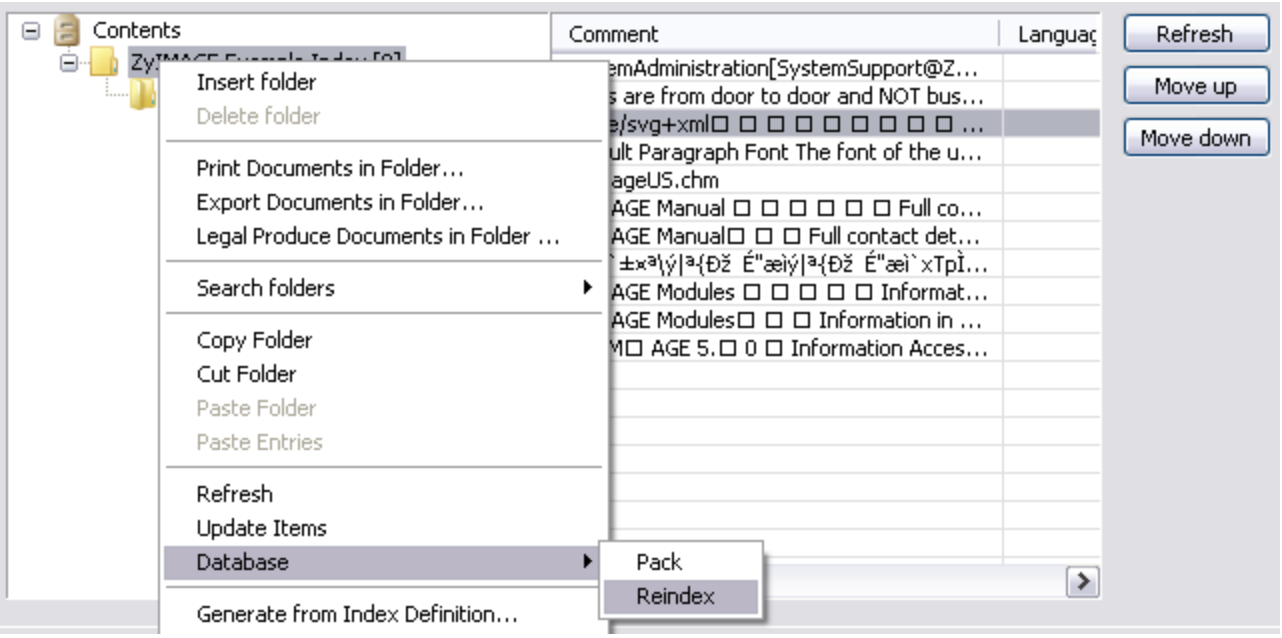
- Copy and paste an existing folder, by clicking your right mouse button on the desired folder and choosing 'Copy folder'. Go to the new (personal) Table of Contents, click the right mouse button and choose 'Paste folder'.
- Import a directory structure, by clicking your right mouse button on the root folder and choosing "Generate from Index Definition".
- Import ZySCAN documents only
- Structure the columns that define your documents (title, author, date, etc.) as follows:
  1. Select the Table of Contents (folder).
  2. Click the right mouse button.
  3. Select Contents Options.
  4. Select Field view settings.
     The Edit view dialog appears.



5. Click New.
6. Enter a new view name.
7. Click OK.
8. Select a category.
9. Select and order the items with the arrows and the Move up and down buttons.
10. Click OK three times.
11. Click the right mouse button in the right pane and select the view with Select View.



- When a CD is published of an index, the table of contents is published as well.
- Maintain the Table of Contents by selecting it in the left pane and clicking the right mouse button.
  - Select Database > Pack or Reindex to optimize the internal record structure (removing deleted records, etc.).



- Select Update items to update all document fields to show the latest changes.

Contents: Sort Table of Contents

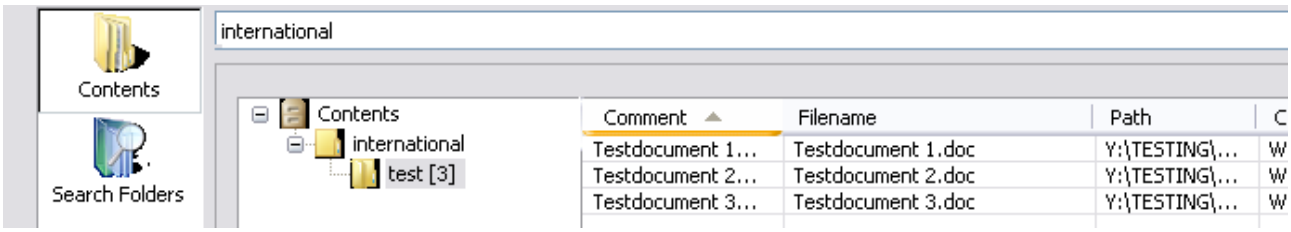
Conditions

You can sort the Table of Contents in ZyFIND based on field values. ZyFIND is open.

Instructions

1. Click the Contents icon:

.



2. Sort on column by clicking on the column header.

> You cannot use the options Cut entries, Paste entries, Move up, and Move down when sorting the Table of Contents.

Result

You have sorted the Table of Contents.

Search Folders: Pre-set Search Queries

Search Folders are pre-set search queries that automatically group the documents found by the search settings in a dynamic table of contents (TOC). There are two types:

- Index-specific search folders which only find documents in the related index
- Global search folders which find documents in all the indexes in the Web Client. (A global search folder can only be created and added using ZyFIND and not the ZyLAB Web Client).

Search Folders created in ZyFIND can be used and edited in the ZyLAB Web Client.

Conditions

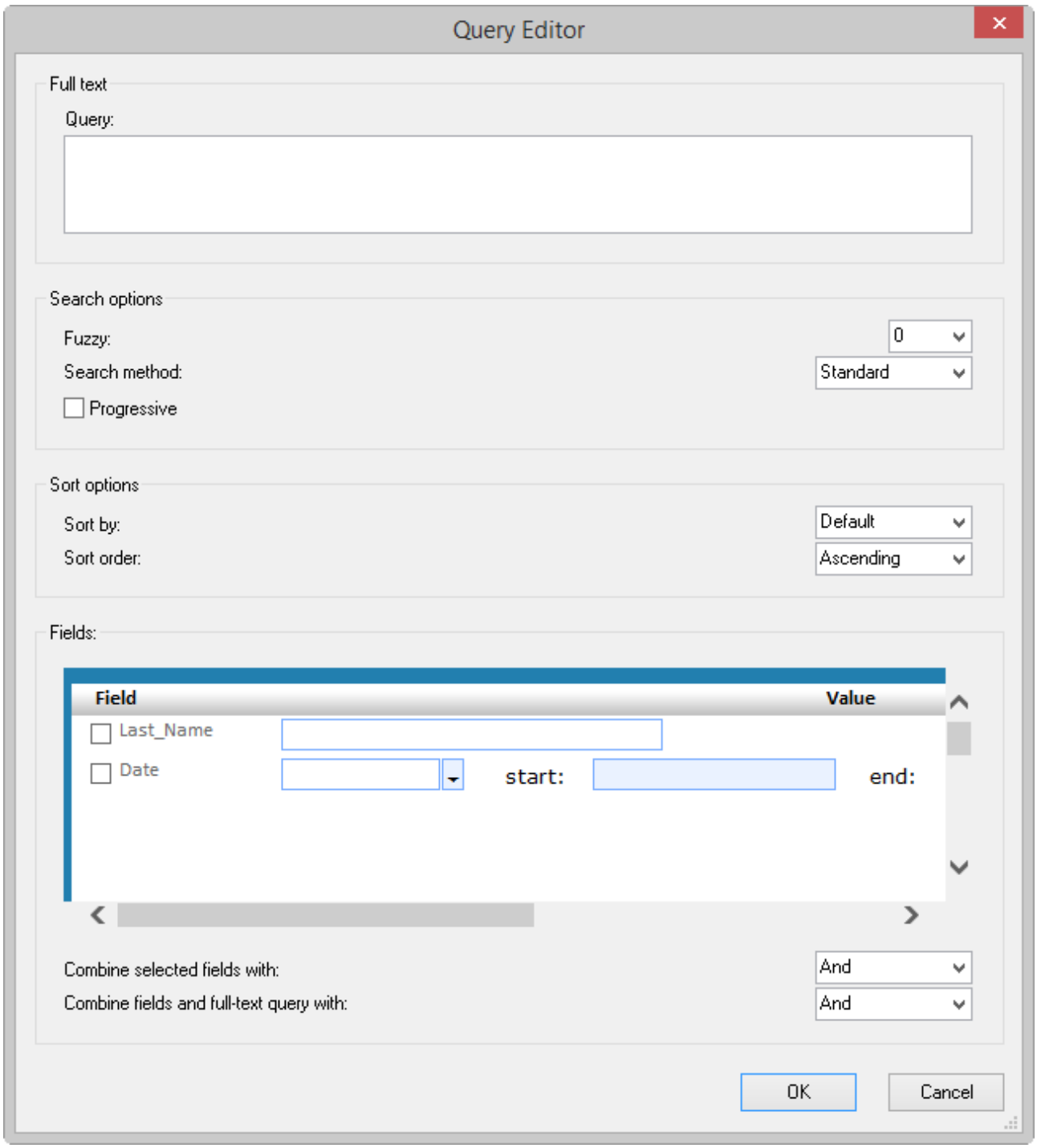
ZyFIND is open, and at least one index is selected. You want to create a dynamic Table of Contents in which files are automatically placed in a results list created using pre-set queries.

Instructions

1. Click the Search Folders icon:

.

2. Right click on the index folder, located beneath the SearchFolders folder.
3. Select the option Edit Search Folder Query.



4. Define a full text query.
5. Select a fuzzy degree (the degree of closeness to your query) from the dropdown listbox.

Fuzzy degree 2 is recommended for normal text searches. This provides for mistakes such as broken and joined characters. Set Fuzzy degree 3 or 4, if you search for long words.

6. Select a search method from the dropdown listbox.
   - Standard (ZyFIND will look for search operators, wildcards, brackets, etc. in your query)
   - All Words (automatically AND operators are inserted between the words)
   - Any Word (automatically OR operators are inserted between the words)
   - Exact Phrase (automatically all words are quoted)
7. Define the sort options.
8. Select and define the values of the fields you want to search on.
9. Combine the selected fields with AND or OR.
10. Combine the fields and full-text query with AND, OR, or AND NOT.
11. Click OK.
    If a search query is defined for a folder, the following icon appears:
12. You can create more folders, and add search queries to them.
13. Search queries can be viewed, edited, deleted or copied by right clicking on the folder, and choosing
    - View Search Folder Query
    - Edit Search Folder Query
    - Delete Search Folder Query
    - Copy Current Query to Search Folder.

Result

You have defined the queries, based on which the Search Folders Table of Contents will be filled dynamically.

Global Search Folders

You can also add Global Search Folders, to create a dynamic TOC for all open indexes in ZyFIND:

1. Right click on the SearchFolders folder.
2. Select Create Global Search Folders.
3. Define a name and location.
4. Click Save.
5. Right click on the new Global Search Folder, and select Insert Folder.
6. Define a name for the folder.
7. Right click on the new folder, and select the option Edit Search Folder Query.
8. Follow the steps explained above to create a search query.
9. Click OK.
10. Select the folder to execute the search query for all opened indexes.

Narrow Search

If you want to limit your search to one folder (including subfolders), right click on a folder, and select Narrow Search. Choose from narrowing your search to the selected folder, or include the subfolders too.

- All folders that are searched, have the following icon:
- All excluded folders, have the following icon:

Fields: Label Documents

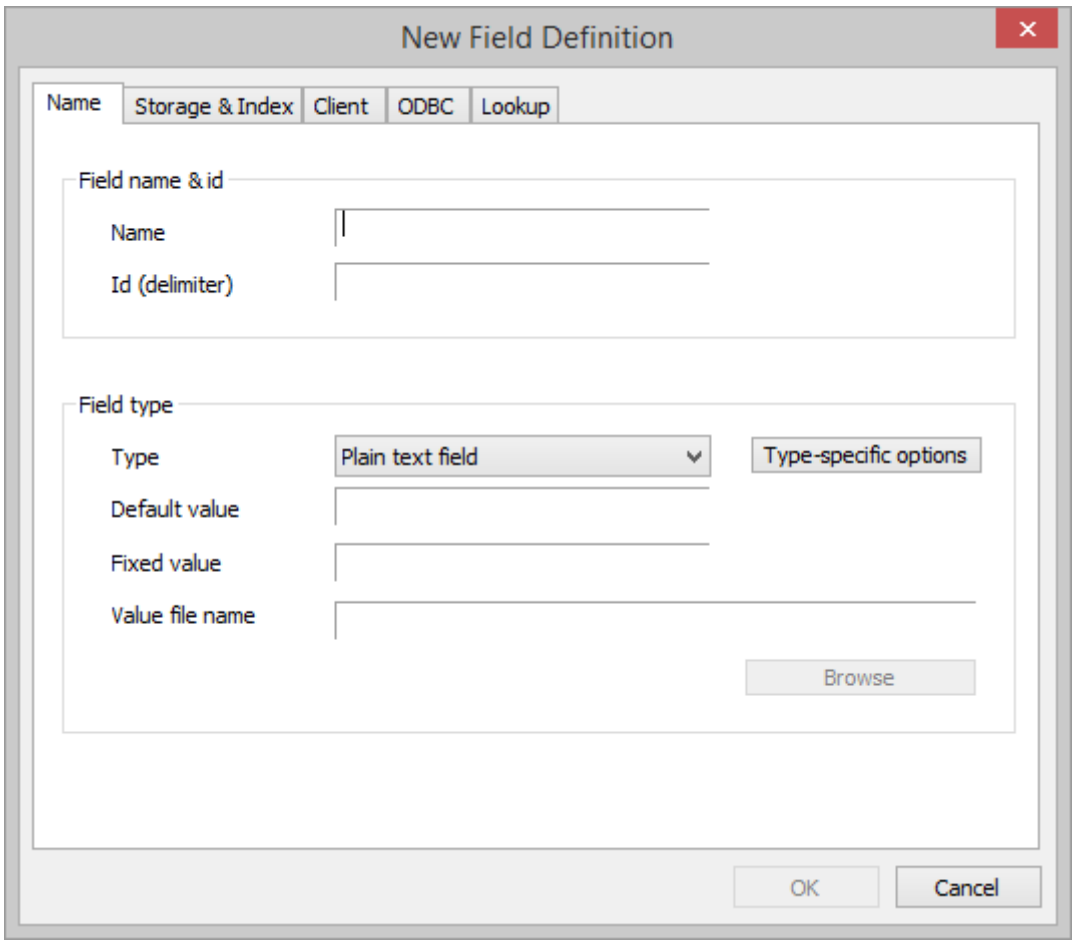
Conditions

ZyFIND is open. Use Fields to label your documents.

Instructions

1. Select an index. For more information, see **Select index(es)** (page 9).
2. Click the Fields icon:

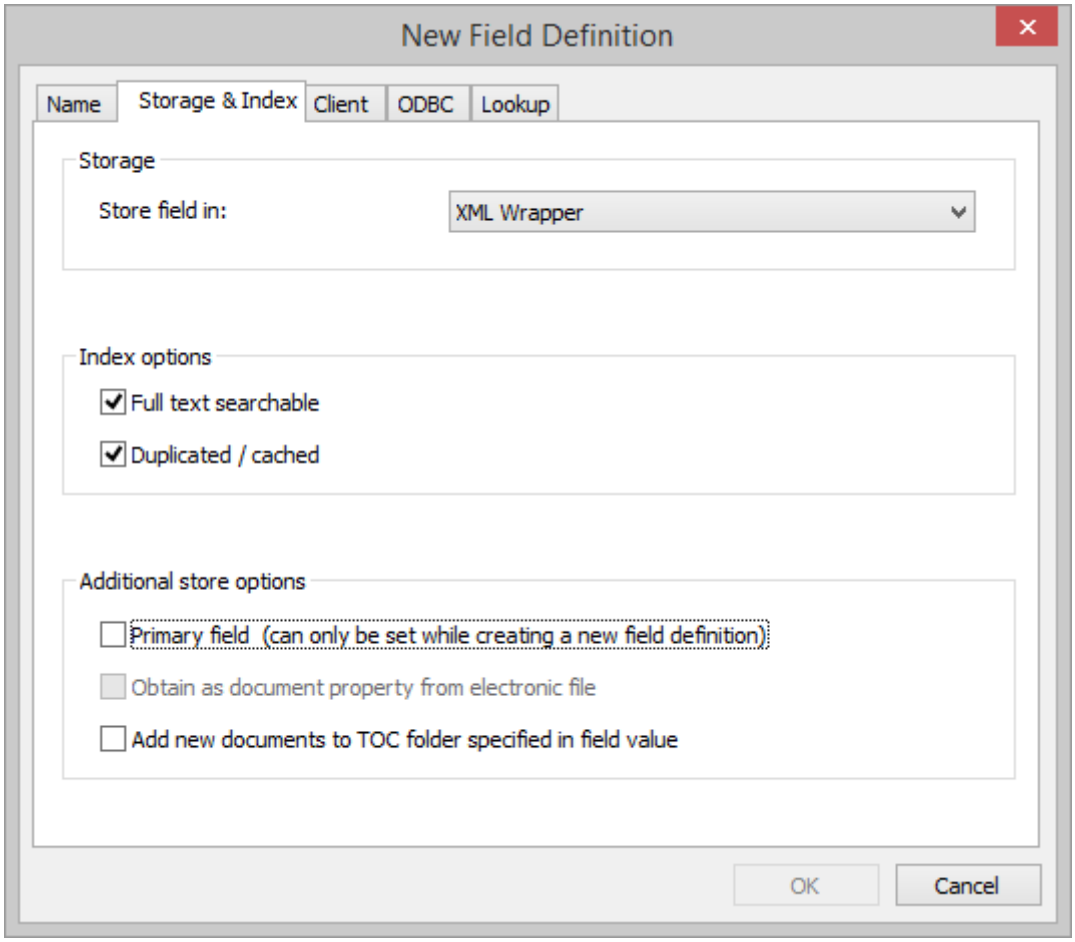
.
3. Click the right mouse button.
4. Select Edit Definitions.
5. Click Add definition.
   The New Field Definition window appears.



6. Fill out the Name of the field definition.

For example, author, name or contract number. A field name may not contain spaces!

7. Select a Type from the dropdown list.
   For more information about the different types, see Field types.
8. Select the Storage & Index tab.



9. If you work with an index with XML Wrapper, make sure Store field in XML Wrapper is selected.
10. Click OK.
    For more information about Field definitions, see Add fields.
11. Click OK.
    You can see the added field in ZyFIND.
12. Search for the document you want to add fields to.
13. Open it in ZyVIEW.
14. Double click the Field, select it and enter a value.

Result

You have added a field definition and field value to a document. After the index is updated (see Build the index), you can search on the added field.

Also see **Editing Field values** (page 69).

Fields: Define Start and End Point Comment String

Conditions

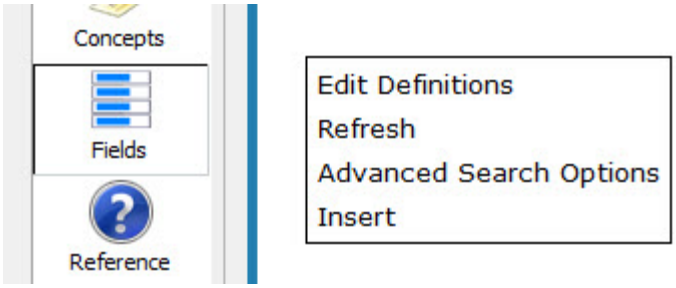
You want adjust the string to be used in the short or long description by defining the start and end character of the comment string. This way, the GUID (starting point of the comment string when using the XML Wrapper for your key fields, and used for fast access to the fields) can be skipped, which will make the description much clearer.

ZyFIND is open.

Instructions

1. Click the Fields icon:

.
2. Click the right mouse button.



3. Select Edit Definitions.
   The Field Definitions dialog appears.
4. Select Advanced Settings.
   The Advanced Field View Settings dialog appears.
5. Select the Short or the Long description.
6. Select the Edit description button.
   The Short (or Long) Description Editor dialog appears.
7. Adjust [docprop:Comment] or [docprop:Comment,50] to, for example, [docprop:Comment,10-50].
   Now, instead of the whole comment string, or the first 50 characters of the string, the characters 10 to 50 will be used.
8. Click OK twice.

Result

You have defined the start and end character of the comment string to be used in your short or long description.

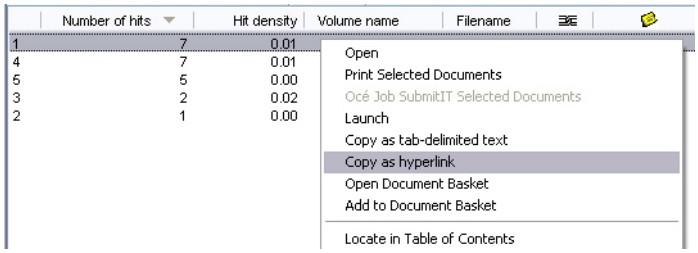
ZyRESULT - Link between documents

Conditions

You have executed a search. ZyResult is open with a result list. You want to create a link between two documents. Check if Hyperlinks is enabled for this index (ZyINDEX > Build > Index Settings > Settings).

Instructions

1. Select the document you want to link to.
2. Click the right mouse button.
3. Select Copy as hyperlink.



4. Double click the document you want to link from.
   ZyVIEW opens with the document.
5. Click the right mouse button.
6. Select Hyperlink > Insert.
   A blue arrow appears.

> If you are in the WYSIWYG view, you first select a spot with the Select button: , click the right mouse button and select Hyperlink > Insert. The selected area turns blue.

Result

You have created a link between two documents. Now, you can double click on the blue arrow/area and jump from document to document.

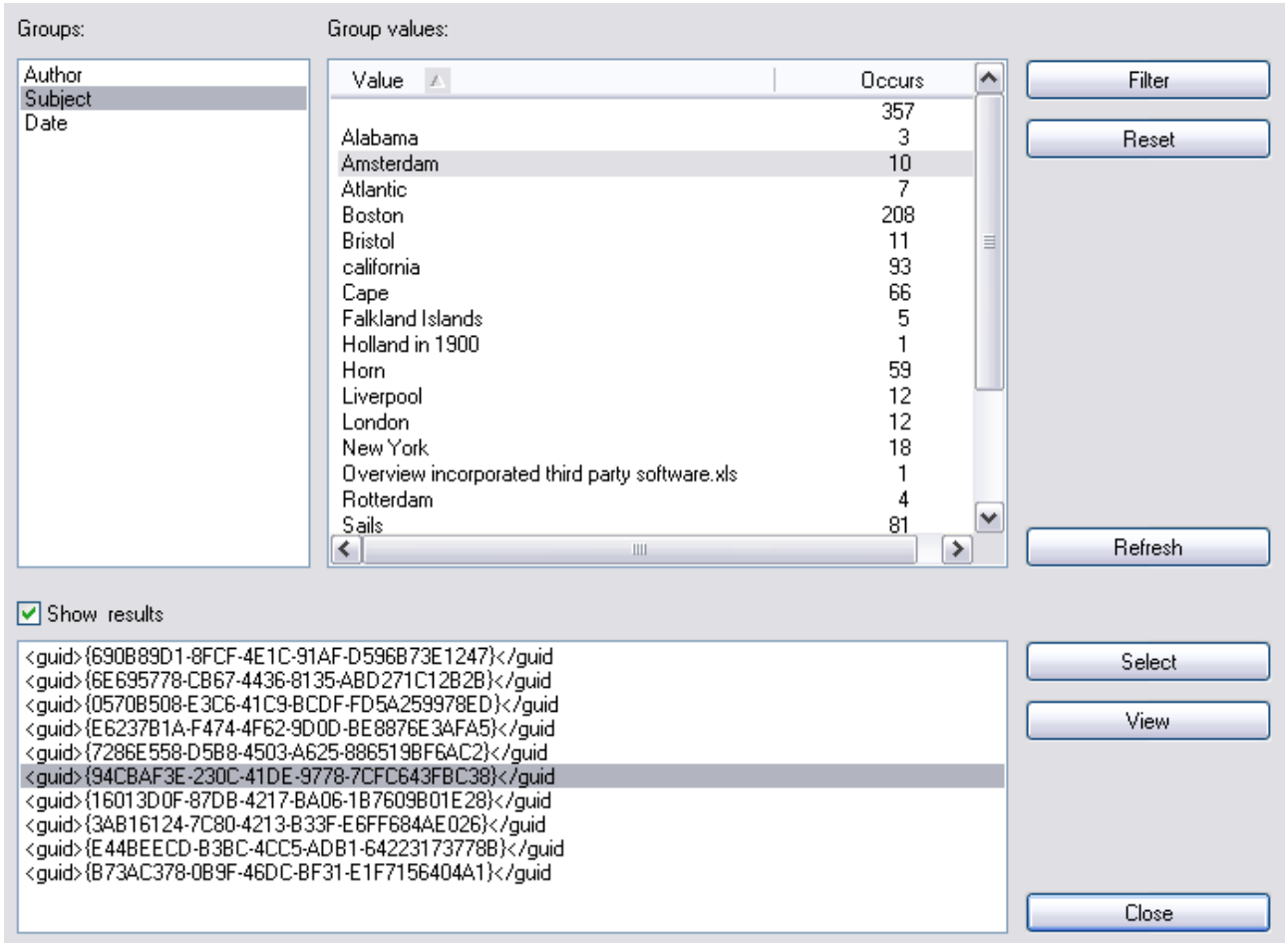
Note

- When working with the Annotations module it is possible to create links between certain parts of the documents as well.

ZyRESULT - Refine Results

Refine results allows you to refine your ZyFIND (and Web Client) results by filtering on fields that have content (contain metadata or a value) (**Refine Your Results** (page 59)).

In ZyResult, the 'Open refine results button' displays the Refine Results dialog showing a list of the values in the visualization-activated fields together with the number of documents containing each value.



Selecting a value displays all documents containing that value in the 'Show results' panel. The 'Select' button highlights a selected result in the ZyResult list. The 'View' button opens the selected result in ZyView. A 'Filter' button further filters the Group values list to get more precise results.

Only fields that have the option 'Use for visualization' selected can be used for the 'Refine your results' function. For more information, see **Field Definition Option: Use for Visualization** (page 60).

Refine Your Results

Conditions

You want to refine your results in ZyFIND. The relevant fields have the 'Use for visualization' option selected (**Field Definition Option: Use for visualization** (page 60)).

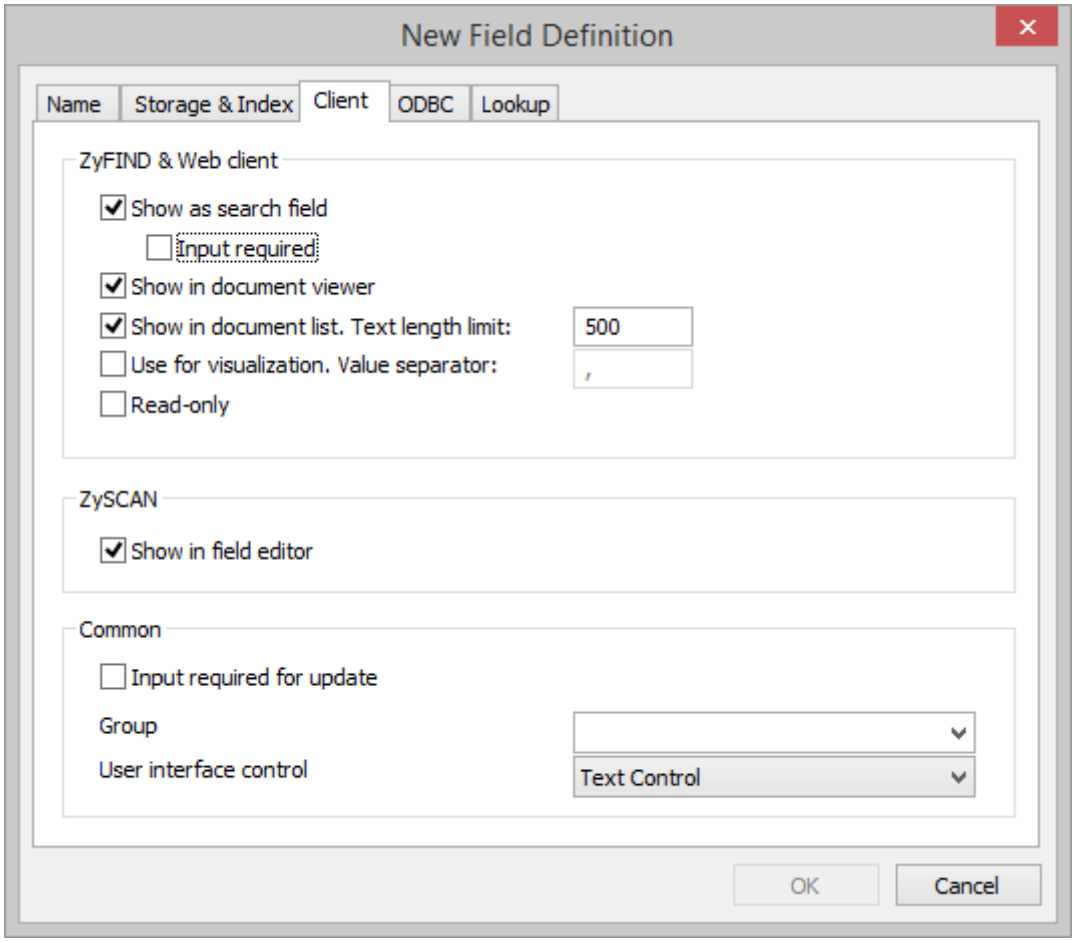
Instructions

1. Search your index(es).
   The results are displayed in the ZyResult list.
2. Click the Open Refine Results dialog button to show the Refine Results dialog.
3. Select a field in the Groups panel. The field values ('Values' column) and the number of documents containing that field value ('Occurs' column) are shown inthe Group values panel.
4. Click the 'Show results' checkbox.
5. Select a value in the Value column. All documents containing this field value are listed in the Show results panel.
   - If necessary, click the Filter button to filter on that field value. The 'Group values' list then shows only those documents containing that field values, and displays the other field values in the same field on those documents. You can filter down to a single document.
   - Click Reset to view all group values again.
6. In the 'Show results' panel select one result:
   - Click the Select button to locate the document in the ZyResult list.
   - Click the View button to open the document immediately in ZyView.

Result

You have refined the results.

Field Definition Option: Use for visualization



ZyINDEX > Build > Define Fields > Define > Add definition > Client tab

The option 'Use for visualization' enables you to refine your search results by filtering on the content of the field (see **Refine Your Results** (page 59)). For the Single-select list field, the Multi-select list field and the Logical field, 'Use for visualization' is a default option.

Once the 'Use for visualization' checkbox is selected, you can define the Value separator (the default value is a comma). The defined delimiter will be used for dynamic filtering (Refine your Results), including the Star Tree and Tree Map. It is recommended to use punctuation characters. If the value separator is empty, the field value will not be split. A value separator can include, start or end with one or more space characters.

Notes

- When editing fields, still a comma will be used to split or combine field values.
- In eDiscovery the Value separator is particularly useful. For example, in Microsoft Outlook fields with email addresses are split with a semicolon (;). These fields should be linked to a ZyINDEX field with a semicolon as the Value separator.

Analyze

With the ZyLAB Analytics Server (part of the Analytics Bundle) installed you can run on-the-fly analysis of a document that is open in ZyView.

Conditions

The following conditions are required for on-the-fly analysis from ZyView:

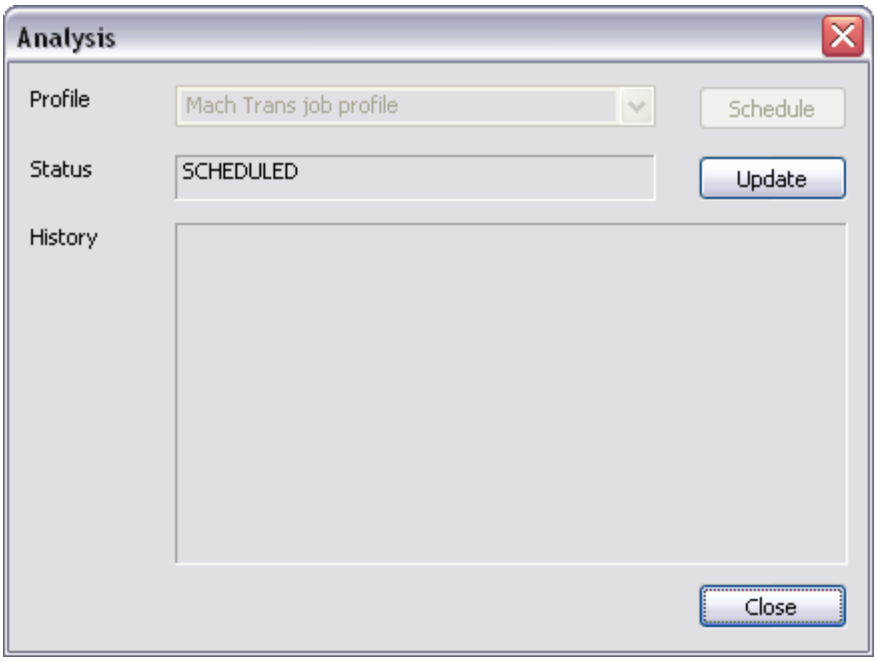
- In ZyINDEX, you must enter the Analytics Server location (see ZyINDEX > ZyINDEX Options > Global Settings > System Settings).
- The Index must be connected to a database (see ZyINDEX > Advanced Indexing > Linking to ZyLAB Analytics Server) with specific fields modules.
- The Analytics Server job profile must be set up, and the fields mapped to the index (see ZyLAB Analytics Server > About Analytics Server > Job Definition and Field Mapper.
- The Analytics Server Job must be active and the job process started (see ZyLAB Analytics Server > Processing in Detail > Select/Monitor Process Jobs).

Instructions

1. Search for a document in ZyFIND and open it (in ZyView).
2. In ZyView, click the Show Analysis Dialog button .

   This button is only active when all settings are correct.

   The Analysis dialog box opens.



3. Select the required Profile from the drop-down list. The profiles listed are the currently-active jobs in Analytics Server.

4. Click Schedule to schedule the document for analysis. The document is added to the Analytics Provider queue for processing. The speed of processing depends on the capacity of the analysis providers. The Status panel shows the status of the process; the status can be updated using the Update button. The statuses are:
   - Scheduled - document is queued for processing
   - Processing - document is being analyzed and the fields populated with analysis data and/or the document is being translated
   - Completed - the process is finished
   - Failed - the process has failed. Possible reasons are that the Analytics Server is not correctly configured, or there is a network failure.
5. The History shows the processes completed on the document.
6. Click Close to close the Analysis dialog.

   The Close button does not stop the analysis process. You have to use the Cancel Process button in Analytics Server to stop a process.
7. When the analysis has finished build the index using ZyINDEX.
8. Extracted information stored in fields is visible in the fields area of the ZyFind window.
9. If text was translated, in ZyView click the Display Translation button to toggle between the translation and the original.

Result

The document was analyzed and its fields were populated with analysis information. Translations were stored in a linked document.

Customize

Customize describes various options for using the results list and working with documents:

- **Sort the result list** (see "**ZyRESULT - Sort the result list**" page 64)
- **Editing Field values** (page 69)
- **Delete a page** (see "**ZyVIEW - Delete a page**" page 72)
- **Merge documents** (see "**ZyRESULT - Merge documents**" page 66)
- **Delete documents** (see "**ZyRESULT - Delete documents**" page 68)
- **Delete references to documents** (see "**ZyRESULT - Delete references to documents**" page 67)
- **Split a document** (see "**ZyVIEW - Split a document**" page 73)
- **Edit a document** (see "**ZyRESULT/ZyVIEW - Edit a document**" page 71)
- **Reuse an image** (see "**ZyVIEW - Reuse an image**" page 74)

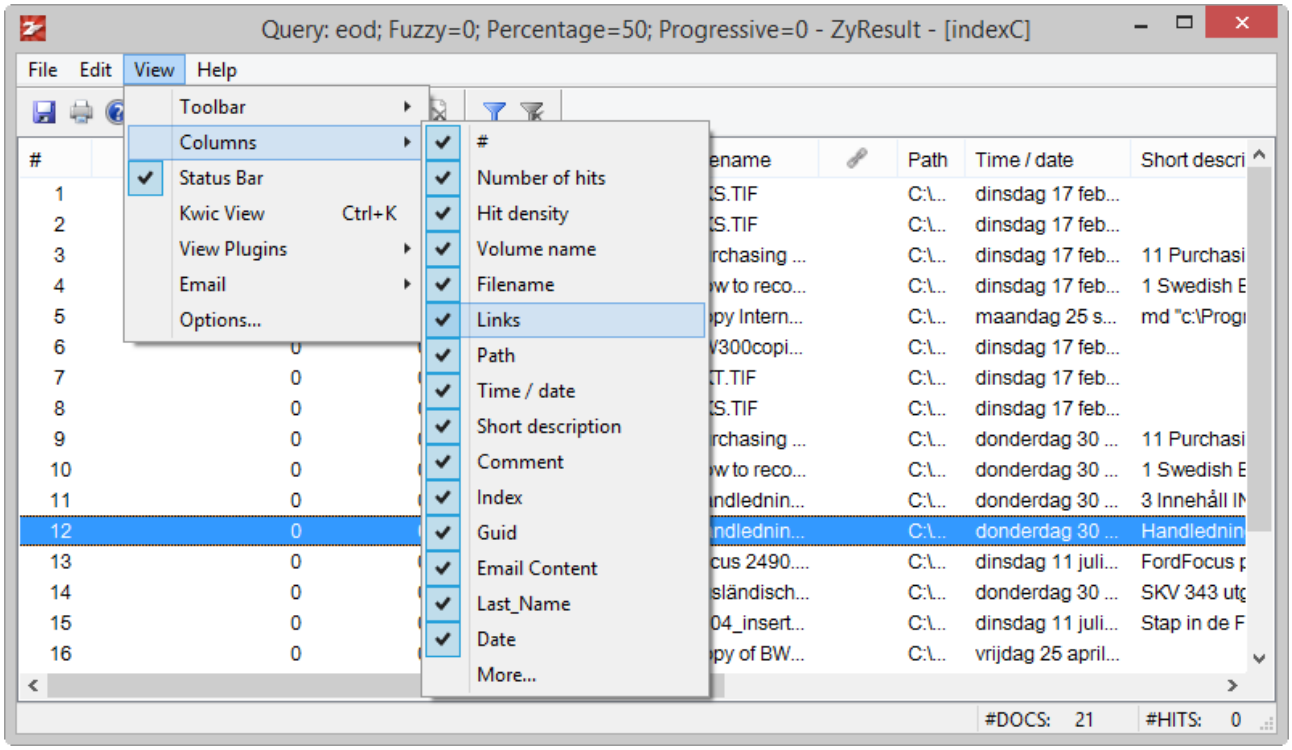
ZyRESULT - Sort the result list

Conditions

You have executed a search. ZyResult is open with a result list.

Instructions

- Click the table headers of the columns to sort the results.
- Columns may be switched on/off via View > Column.



Result

You have sorted the result list.

Note

- By default, the list is sorted based on hit density. The most relevant document, i.e. with the highest hit density, it ranked first.
- Numbers are sorted as follows:

  002string

  02string

  2string

  3string

  20string

st2ring

st3ring

st20ring

string2

string3

string20

The Guid field follows traditional sort ordering. This ordering is equivalent to hexadecimal numeric ordering.

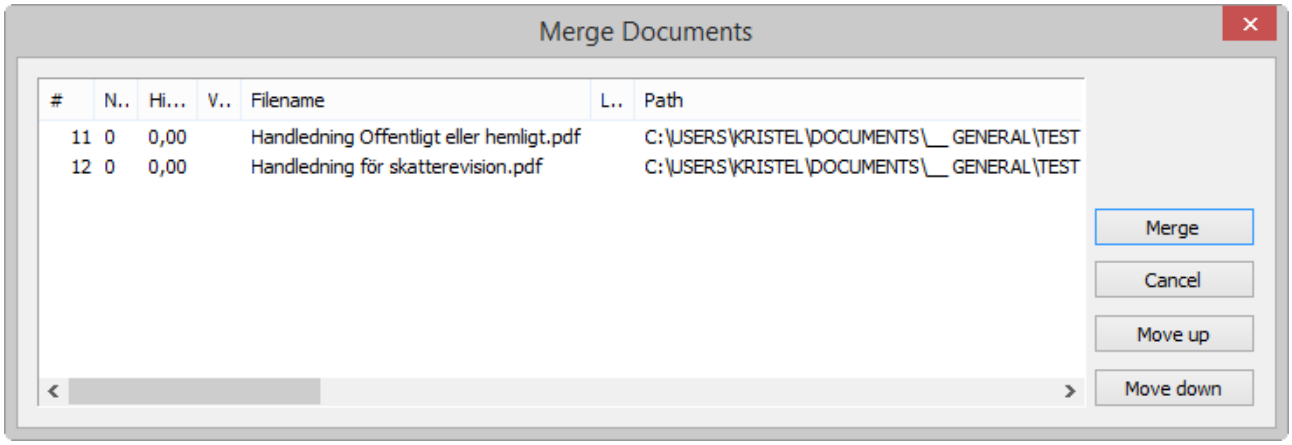
ZyRESULT - Merge documents

Conditions

ZyRESULT is open.

Instructions

1. Select two or more documents from the result list.
2. Click the right mouse button.
3. Select Merge.
4. Select a document and use the Move up and Move down buttons to change the order of the documents.



5. Click Merge.

Result

The documents are merged. Only the Field values of the first document are maintained. Rebuild the index to reflect the changes (using add, update and optimize).

Note

Only documents created with ZySCAN can be merged.

ZyRESULT - Delete references to documents

Conditions

ZyRESULT is open.

Instructions

1. Select one or more references (documents) from the result list.
2. Click the Delete Reference(s) button.

Result

You have deleted references to documents. The documents are still present in the index.

Note

You can also delete references in ZyVIEW.

ZyRESULT - Delete documents

Conditions

ZyRESULT is open.

Instructions

1. Select one or more references (documents) from the result list.
2. Click the Delete Document(s) button .

Result

You have deleted documents from the file system. The next time the index is built with update and optimize, it will no longer appear in the index.

Note

- To prevent mistakes, you can disable the function "Allow deleting of document" in menu View > Options.
- You can also delete a document (contents) in ZyVIEW. Click the Delete Contents button. First, make sure "Allow deleting of document" is selected (menu View > Options).

ZyRESULT/ZyVIEW - Edit Field values

Conditions

ZyRESULT or ZyVIEW is open. In ZyVIEW, the "Display as images" view is active.

Instructions

Change the field values of a set of documents

1. In ZyRESULT, select two or more documents with Ctrl or Shift.
2. Click the right mouse button.
3. Select Fields.
   The Document Properties dialog appears.
4. Double click a Value and change it.
5. Select the Field.
6. From the dropdown list at the right, choose from
   - Append (if you have an empty text string for fields that you do not want to change in the selected documents)
   - Replace (if the new field data is empty, all current field values will be replaced by the same value, or are deleted!)
   - Delete (deletes the field value)
7. Click OK.

Change the field values of a set of documents, using different values for each document

1. Open the first document of the result list (the batch).
2. Select the Batch Field Edit button .
3. Change the Field Value(s).
4. If the last field you changed is a plain text edit field, use Ctrl + Alt + Arrow Right to navigate to the next document. If not (the last field you changed was, for example, a date field), use Ctrl + Arrow Right. A dialog will appear.
5. If you want to save your changes automatically each time you go to the next document with Ctrl + Arrow Right, select 'Yes, apply always'.

For changing the field values of a set of documents via the web, see Web Client: Fast Key Fielding.

Change the field values of one document

1. In ZyVIEW, select the Fieldview button: .
2. Double click a Value and change it.
3. Select the Field name.
4. Click the right mouse button and select Save.

Result

You have edited Field values.

Note

- If are working with ZySCAN Service and TIMER Service, ZyRESULT and ZyVIEW are the only places where the field values can be entered. The field editor shows all fields that are defined in the index and that occur in the document.
- Depending on the *update index automatically after field edit* setting in ZyFIND (Options > Global Settings > Search preferences), the index will be automatically updated after a field edit operation. If this option is disabled, then all documents that are modified are stored in a temporary database of the index so they may be updated all together at a later time.
- If you want to edit or add new field definitions, click the right mouse button and select Show Definitions.
- If you want to choose between editing field (values) in Field View or in a separate dialog, go to ZyVIEW > View > Options and (de)select 'Edit Fields in Main Window'. If this option is selected, Edit Fields (Edit > Edit Fields, CTRL + F or double clicking) will use standard Field View. If not, the separate Document Properties dialog will appear.

ZyRESULT/ZyVIEW - Edit a document

Conditions

ZyRESULT or ZyVIEW is open.

Instructions

1. Select a document in ZyRESULT or view one in ZyVIEW.
2. Click the Launch button: .
3. The document will be opened in the associated application (based on the extension).
4. Edit the document.
5. Save it.
6. Close the application.

Result

You have edited a document. Update the index, to make the changes searchable.

Note

Alternatively, you can export a document from ZyVIEW and then manipulate it in another application. For more information, see **Export document(s** (page 110)).

ZyVIEW - Delete a page

Conditions

ZyVIEW is open.

Instructions

1. Click the right mouse button.
2. Select Delete page.

Result

You have deleted a page.

Note

- If you want to delete pages, make sure the option "Allow deleting of document" is selected (via ZyVIEW > View > Options).
- Only pages from txt and tiff files can be deleted.

ZyVIEW - Split a document

Conditions

ZyVIEW is open.

Instructions

1. Go to menu Edit > Split, or click on the right mouse button.
2. Select Split > Before this page, After this page, or Delete this page.

Result

You have split a document.

ZyVIEW - Reuse an image

Conditions

ZyVIEW is open. You are viewing an image.

Instructions

1. Click the Select button.
2. Select (a part of) the image.
3. Click the right mouse button.
4. Go to Copy > Selection or Page.
5. Open the Windows application you want to use the image in.
6. Paste.

Result

You have reused an image in another Windows application.

ZyVIEW - Redaction

Redaction is the careful editing of a document to remove confidential information. Sensitive government documents, confidential legal documents, insurance contracts, and other sensitive documents are often redacted before being made available to the public.

ZyFIND Redaction makes it easy for you to mark sections of a document. You can then redact the document so that the sections you specified are blacked out or replaced with something else. You can either print the redacted document or use it electronically. In the redacted version of the document, the redacted text cannot be converted back to text or retrieved.

Documents produced as TIFF files in ZySCAN can be directly redacted. Electronic documents built directly into an index must first be converted to the TIFF format using the TIFF Conversion feature in ZyVIEW.

Redaction has the following topics:

- **Create Redaction index** (page 76)
- **TIFF Conversion for Redaction** (page 77)
- **Create Redaction** (page 78)
- **Edit/Delete Redaction** (page 82)
- **Print Redacted Document** (page 83)
- **Export Redacted Document** (page 84)
- **Search Redactions** (page 85)
- **Security Redaction** (page 86)

Create Redaction index

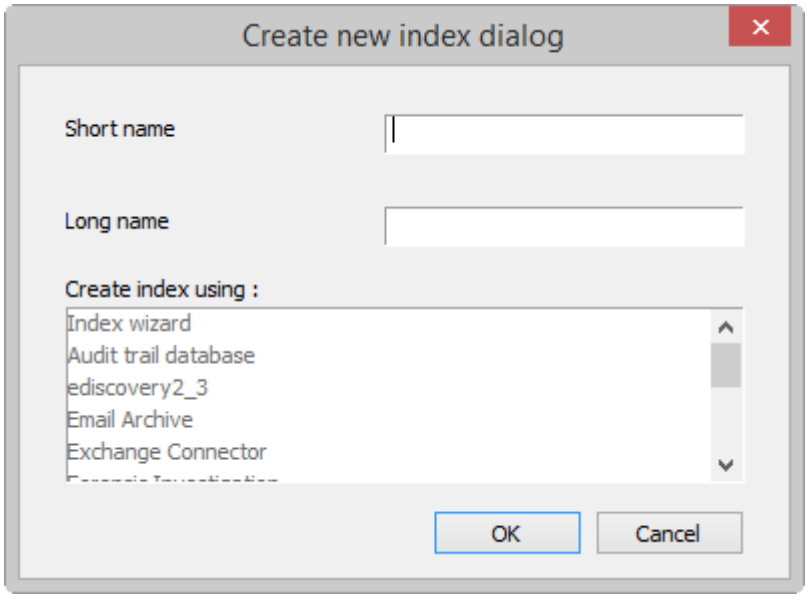
Conditions

ZyINDEX is open.

Instructions

1. Click the BUILD icon:

.
2. Go to File > New.



3. Enter a Short name (max. 8 characters).
4. Enter a descriptive Long name (max. 80 characters). Use the name to describe the contents of the index.
5. Select Redaction.
6. Click OK.

Result

You have created a Redaction index (with XML Wrapper and Redaction field). Now, add ZySCAN and/or electronic documents to this index and redact the documents via ZyFIND > ZyVIEW *or* add the Redaction index to a Web Client and redact files via the Redactions icon .

TIFF Conversion for Redaction

Conditions

The document you want to redact is not in a TIFF format. You have installed the ZyLAB Export2TIFF printer driver (this appears in your printer list as 'ZyLAB Tiff Export' printer). You have defined the Tiff Conversion Settings in ZyINDEX.

> Note: Documents already in a TIFF format (for example, those created in ZySCAN) can be directly redacted (**Create Redaction** (page 78)).

Instructions

1. Open the non-TIFF document you want to redact in ZyVIEW.
2. Click Tiff Conversion > Create Tiff Conversion (or press the Create Tiff Conversion button). A TIFF image is created from your document and is displayed on the screen.
3. To change back to the original document click View > WYSIWYG. To view the TIFF again click View > Display as images. You can also use the 'Display as Images' and 'WYSIWYG' toolbar buttons.
4. To delete the TIFF image, click Tiff Conversion > Delete Tiff Conversion (or press the Delete Tiff Conversion button).

Result

A TIFF version of your document has been created, and it can now be redacted.

The TIFF file is saved in the index's Data > TIFF folder. The TIFF file can also be viewed in the ZyLAB Web Client.

Create Redaction

Conditions

You have executed a search via ZyFIND, and opened a (TIFF) document via ZyRESULT. ZyVIEW is open.

> Note: When you create a new redaction the redaction wizard appears to guide you through the steps. If you want to edit an existing redaction double-click on the redaction to open the Edit Redaction dialog.

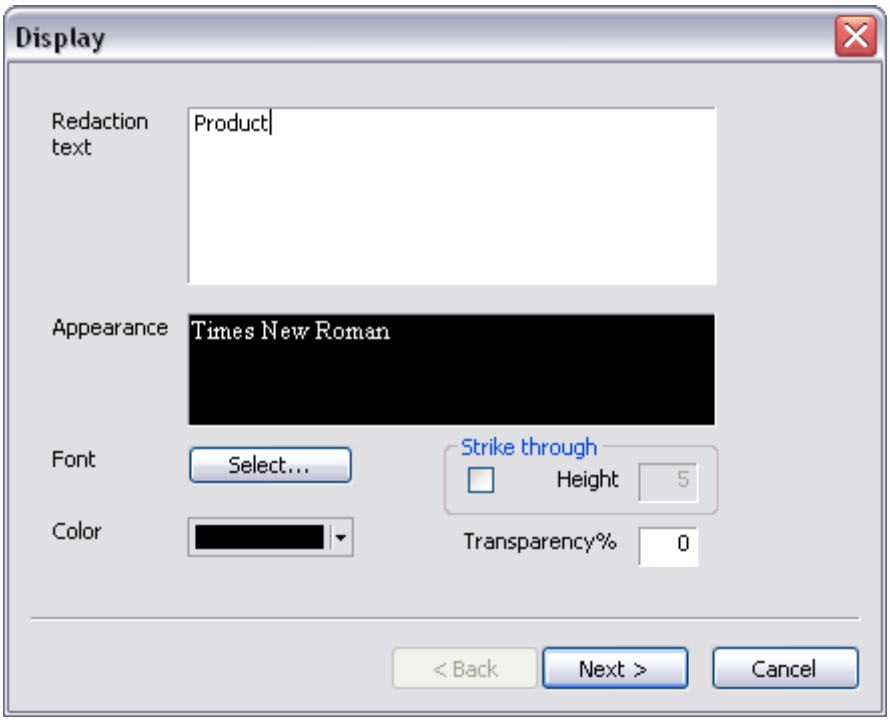
Instructions

1. Click and drag with your mouse to define a section of the document you want to redact. Go to Redaction > Create, or click with your right mouse button and select Redaction > Create.

   or

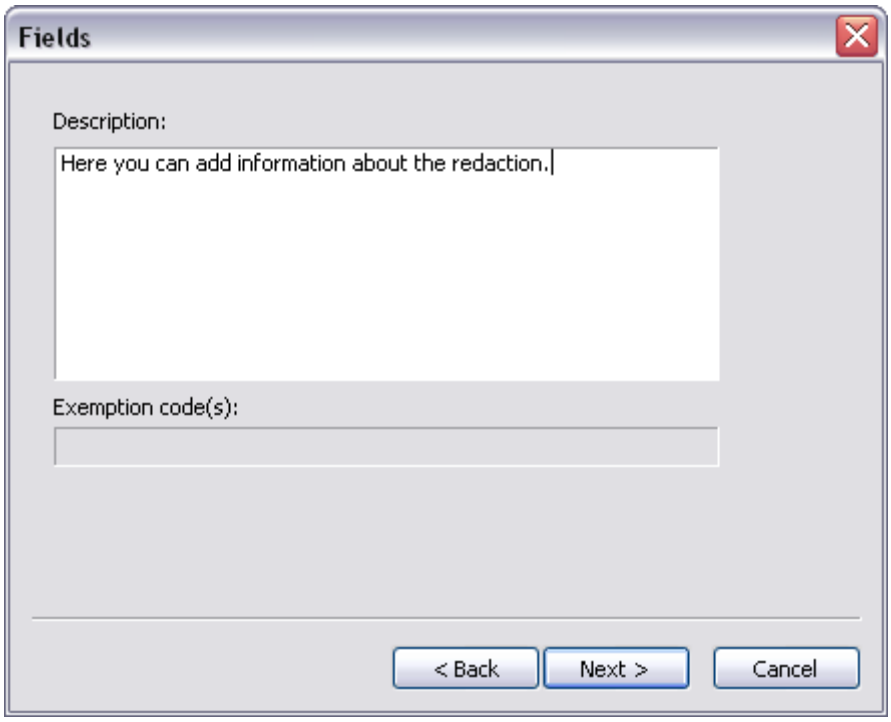
   Select the Quick redact icon and click and drag with you mouse to define a section of the document you want to redact.

   The Redaction Wizard Display dialog appears.



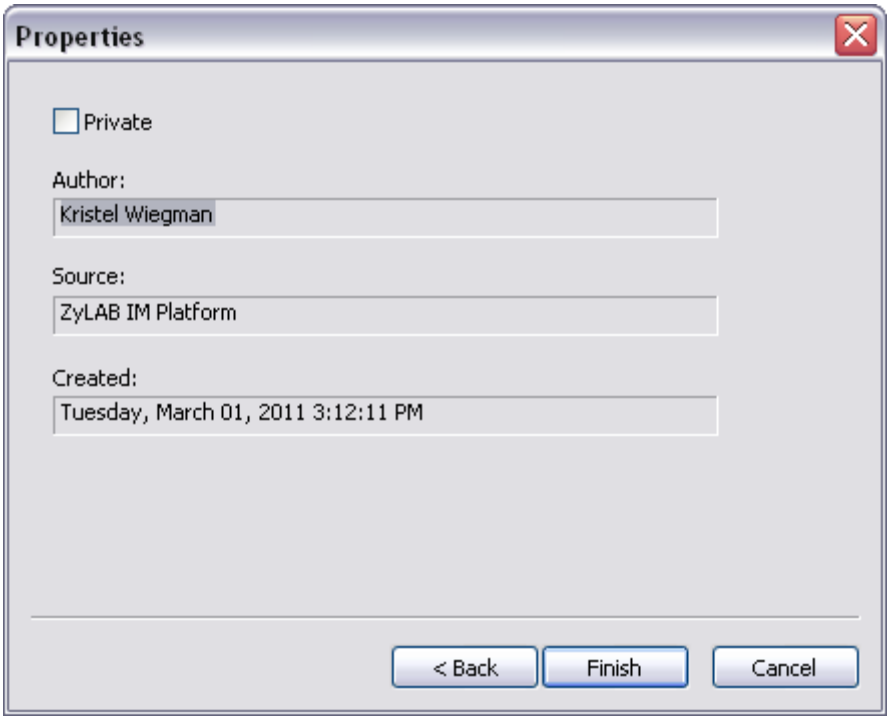
2. Define the text that must replace the selected section.
3. Select a font and a background color.
4. Define the Strike through.

5. Define the percentage of Transparency.
   The default value is 0% (solid/opaque), 100% transparency means the redaction is invisible.
6. Click Next to display the Fields tab.
   The Redaction Wizard Fields dialog appears.



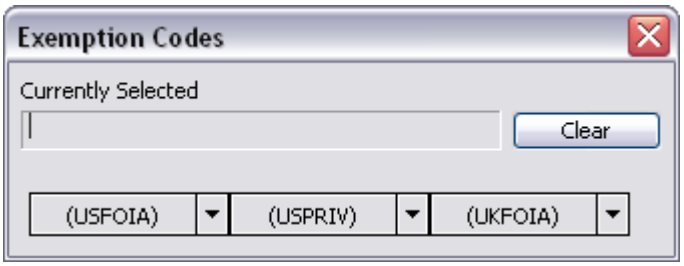
7. Enter a description for the redaction (for example, what you replaced and why).

8. Click Next to display the properties dialog showing the Author, Source and Created date of the redaction.
   - Select the Private checkbox, to show a redaction only to the person who created it.



9. Click Finish.
10. If you want to apply a Freedom of Information Act (FOIA) or Privacy Exemption Code to your redaction, select your redaction.
11. Go via the menu to Redaction > Exemption Dialog to display the Exemption Codes dialog. Select the exemption code(s) you want from the drop-down lists (you can add multiple codes in random order). To remove older codes, select the Clear button.

Choose from exemption codes for USA FOIA, USA Privacy, and UK FOIA. Exemption Codes define when the general right of access to information is either not allowed or qualified. The exemptions relate to issues such as national security, law enforcement, commercial interests, and data protection.



   - If you plan on making more redactions, you can leave the Exemption Codes dialog open. It will always float on top. When you select another redaction, it will show the codes of the currently selected redaction and enable you to add/remove codes immediately.

12. You can set the position of the exemption code by selecting one of the following from the Redaction > Show Exemption menu:
    - **Left aligned**. The exemption code appears in the left margin adjacent to the redaction, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
    - **Track redaction**. The exemption code appears in the redaction box itself, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
    - **Off**. The exemption code is not shown on the document. It only appears in the Exemption codes text box on the Edit Redaction dialog - Fields tab.

Result

You have created a redaction. All occurrences of the selected text are redacted.

Note

- To re-use a redaction, select one or more redactions (via Redaction > Select), and go to Redaction > Copy. Open another document (or go to another page within the document), select the correct section of the text and go to Redaction > Paste.

Edit/Delete Redaction

Conditions

You have created one or more redactions in ZyVIEW.

Instructions

1. Click on a redaction to select it.
   - To select multiple redactions, go to Redaction > Select > All on page, or All in document.
2. If you want to delete the redaction(s), go to Redaction > Delete.
   - Click Yes.
3. If you want to edit the redaction(s), go to Redaction > Edit.
   - Change the text and/or representation.
   - See also the Fields tab for changing meta data.
   - Click OK.
     If you selected multiple redaction, the next redaction will appear.
4. If you want to resize or move a redaction:
   - To resize a redaction, select it and click and drag one of the borders/corners of the selection.
   - To move a redaction, select it and click and drag it to the new position.
5. To re-use a redaction, select one or more redactions, and go to Redaction > Copy. Open another document (or go to another page within the document), select the correct section of the text and go to Redaction > Paste.
6. Show/hide redactions using Redaction > Show.

Result

You have edited or deleted a redaction.

Print Redacted Document

Conditions

You redacted and saved a document in ZyVIEW.

Instructions

1. Go to File > Print.
2. Select the option 'Print Redactions'.
3. For all other options, see ZyFIND Manual > Working with documents > Share > Print > **Print document(s)** (page 97).
4. Click OK.

Result

You have printed a redacted document.

Export Redacted Document

Conditions

You redacted and saved a document in ZyVIEW.

Instructions

1. Go to File > Export.
2. Select Export to directory, or Export to zip.
3. Select in the ZySCAN document options section, the option Redact output.
4. From the dropdown listbox Exemptions, select the position of the exemption code.
   - **Left aligned**. The exemption code appears in the left margin adjacent to the redaction, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
   - **Track redaction**. The exemption code appears in the redaction box itself, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
   - **Off**. The exemption code is not shown on the document. It only appears in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
5. For all other options, see ZyFIND Manual > Working with documents > Share > **Export document(s)** (page 110).
6. Click OK.

Result

You have exported a redacted document. A tiff and xml file is exported. The tiff file contains the redaction zone on it. Redacted documents can only be exported as multipage tiff images. The corresponding xml file contains a link to the tiff file without any ocr text or file information data/size etcetera.

You can import the exported documents using the ZyLAB Data XML import filter to (re-)OCR them without the redacted zone on it. Just point to the correct import directory that contains the tiff images and related xml files (ZySCAN > ZyIMPORT Source Properties, or via Template Wizard > ZyIMPORT).

Search Redactions

Conditions

The redactions and descriptions of the redactions are saved in the Redaction field. They can be searched via ZyFIND > Fields.

Instructions

1. Define in the field Redaction the term you want to search on.
2. Click Search.

Result

You have searched all redactions and descriptions of the redactions.

Security Redaction

Functional Security Redaction

ZyLAB Functional Security can be used to restrict access to redaction editing features in ZyFIND. Index administrators and editors are able to create and edit redactions. Index users and guests are not allowed to do this. Everyone will be able to view redactions for inspection. A user can be assigned to a particular role. This role can be changed per index, if necessary.

There are no separate functions to secure redaction editing or creating. Both are secured as part of the 'Edit Redaction' function.
Settings can be changed via ZyINDEX > Security > Functional (Application) Security *(make sure Functional Security is On, via ZyINDEX > Security > General > Settings)* > Assign Role to Functions. Go to Product/ZyFIND, Part/ZyVIEW, and Function/Edit Redaction. For more information, see Functional (Application) Security.

Audit Trail Redaction

When a redaction change is applied, a record to the Audit Trail is saved. For more information, see ZyINDEX Manual > Security > General > Audit Trail.

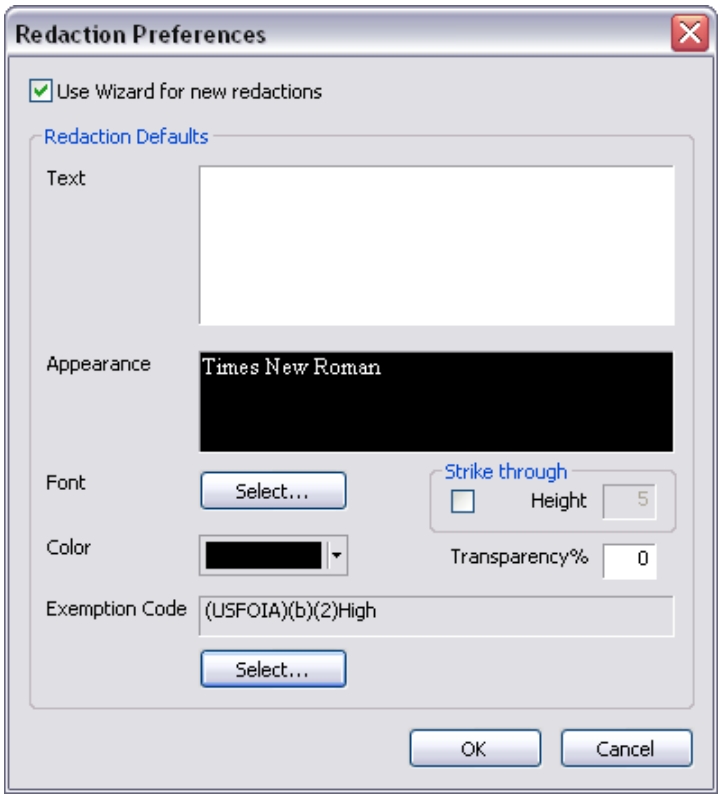
Redaction Preferences

Conditions

You want to define the default settings for redactions.

Instructions

1. In ZyVIEW, go to Redaction > Redaction Preferences.
   The Redaction Preferences dialog appears.



2. If you do not want the Wizard to appear each time you make a redaction, deselect the checkbox Use Wizard for new redactions.
3. Define the Redactions defaults.
   - Define the text that must replace the selected section.
   - Select a font and a background color.
   - Define the Strike through.
   - Define the percentage of Transparency.
     The default value is 0% (solid/opaque), 100% transparency means the redaction is invisible.
   - Click the Select button to define the Exemption Codes that should be included.
4. Click OK.

Result

You have defined the Redaction Preferences.

ZYVIEW - Strikethrough

Conditions

You want to generate strikethrough text in a document.

Instructions

1. Go to Redaction > Quick Strikethrough or select the Quick Strikethrough button .
2. Click and drag with your mouse to define a section of the document you want to strikethrough. The function will be active, until you deactivate it by selecting t
3. Select the Strikethrough checkbox, define the height and click Next until Finish.

Result

You have generated strikethrough text in a document.

ZyVIEW - Stamp Tool

Conditions

You want to add a stamp to a document. You have created an index with XML Wrapper in ZyINDEX/Build, and added scanned documents using ZySCAN (for more information on how to proceed, see Review Guide Index Scan Find).

Instructions

1. Start ZyFIND and select the correct index.
2. Enter a query and click Search.
3. Select a document and double click to view.
4. Go to Stamps > Stamp Tool > Stamp or select the Stamp tool icon .
   The Stamp Properties dialog appears. You can select a stamp from the library, or create a new one.

   Create Image is in development.
5. If you want to create a text stamp, click Create Text.
   The Define Text Stamp dialog appears.
   - Define a Title for the stamp.
   - Define the Text.
     If you want to include the date, use %ZD to list the date in the format of the regional settings of the OS.
     If you want to include the time, use %ZT to list the time in the format of the regional settings of the OS.
   - If you want to select another font, click Select font.
     Define the font (type, style, size, effects, color, script) and click OK.
   - For a solid background, select the checkbox Solid. Select a background color via the dropdown box.
   - Click OK.
     The stamp will be added to the library.
6. To edit or delete a stamp, select Edit or Delete.
7. To use a stamp, select it and click OK.
8. Choose a location to place the stamp, and click your left mouse button.
9. The chosen stamp will be available (visible through the arrow with stamp image) and can be used repeatedly until you turn the stamp tool off via Stamp > Stamp Tool > Off.
10. Once the stamp tool has been turned off, you can rotate stamps. Select a stamp and go to Stamp > Rotate Left or Rotate Right. Or select one of the icons (Rotate stamp left or Rotate stamp right).
11. Once you are finished and want to make all stamps permanent, go to Stamps > Make Permanent. Click Yes.
12. To hide/show all stamps, go to Stamps > Show Stamps.

13. Adjustments to stamps can be made via Stamps > Stamps Tool > Preferences.
14. If you want to print your document, go to File > Print. Select the option Print annotations, if you want to include them.
15. If you want to export your document, go to File > Export.

Result

You have created text stamps, and added them to a document.

Share

Share has the following topics:

- **Print** (page 92)
- **Mail document** (see "**ZyRESULT/ZyVIEW - Mail document**" page 108)
- **Share a result list** (see "**ZyRESULT - Share a result list**" page 109)
- **Export document(s)** (page 110)
- About Legal Production
- **Export TOC and documents** (see "**ZyFIND - Export TOC and documents**" page 117)
- **Report result list statistics** (see "**ZyRESULT - Report result list statistics**" page 118)
- TIFF Production Module

Print

The print functions are:

- **Print Table of Contents** (see "**ZyFIND - Print Table of Contents**" page 93)
- **Print result list** (see "**ZyRESULT - Print result list**" page 95)
- **Print document(s)** (see "**ZyFIND/ZyRESULT/ZyVIEW - Print document(s)**" page 97)

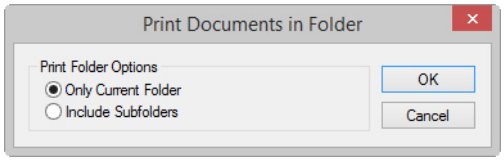
ZyFIND - Print Table of Contents

Conditions

ZyFIND is open. You have selected the Contents icon.

Instructions

1. Select the Table of Contents you want to print.
2. Click the right mouse button.
3. Select Print Documents in Folder.
   The Print Documents in Folder dialog appears.



4. Select
   - Only Current Folder, or
   - Include Subfolders
5. Click OK.

Result

The documents listed in the Table of Contents are printed.

Print Document(s) in the T-View Lay-Out

Conditions

You want to print document(s) in the lay-out of the T-View (Display as Text). Displays the text file containing the OCR text and image links of an image document exported by ZySCAN or any other filter indexed as type ASCII.

Instructions

1. Open ZyFIND.
2. Search document(s).
3. Right click on the document(s).
   (Or, in ZyRESULT/ZyVIEW, select the Print icon, or go to File > Print (Selected Documents))
4. Select Print Selected Documents.
   The Print Job Configuration dialog appears.
5. Select, in the Document Settings box, the option Print raw text.
6. Click OK.

Result

You have printed document(s) in the T-View lay-out.

ZyRESULT - Print result list

Conditions

You have executed a search. ZyRESULT with the result list is open.

Instructions

1. Go to File > Print Result List.
2. Click Setup.
3. Select a printer from the Name dropdown listbox.
4. To view/define the properties of the selected printer, click Properties.
5. Optionally, define Paper (Size and/or Source) and Orientation (Portrait or Landscape).
6. To connect to a shared network printer, click Network.
   - Expand and select a printer from the list.
   - Click OK.
7. If you want to change the logo on the result list, click Select.

   Choose from:

   Browse (select another image),
   Default (keep the ZyLAB image) or
   None (no images will be included).

   Click OK to confirm.

   Once an image has been changed, it will become the default image.
8. Click OK.

Result

The result list is printed.

Use Unabridged document fields

Conditions

ZyRESULT is open. You want to print an entire long field value (> 1024 characters). For example, more than 200 people in the CC field of an email.

Instructions

1. Go to File > Print Result List.
2. Select the option "Use Unabridged document fields".
3. Click OK.

Result

The entire long field values are printed.

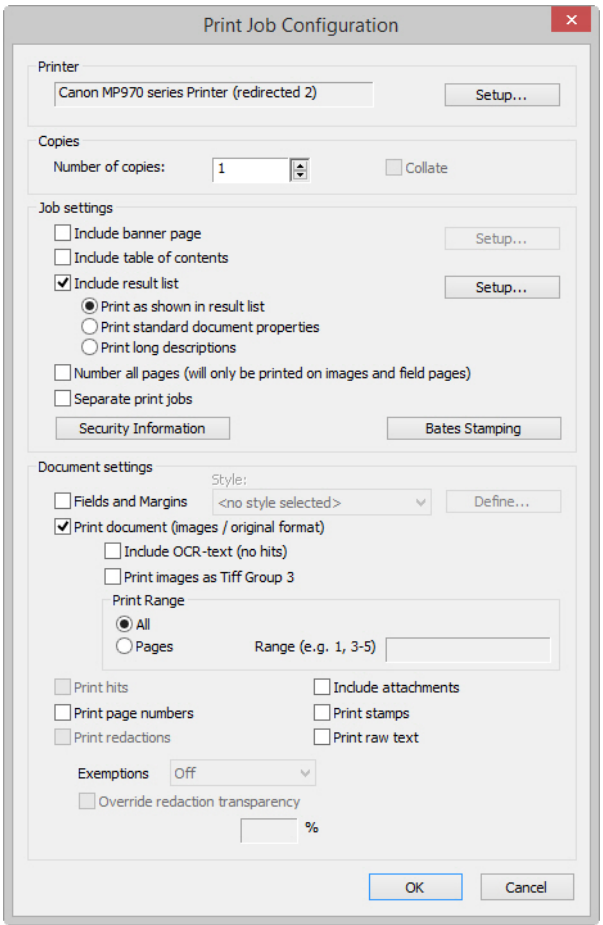
ZyFIND/ZyRESULT/ZyVIEW - Print document(s)

Conditions

ZyFIND (Contents) or ZyRESULT or ZyVIEW is open.

Instructions

1. In ZyFIND (Contents) or ZyRESULT, select one or more documents, click the right mouse button and select Print Selected Documents.
   In ZyFIND (Contents), select a folder, right click and select Print Documents in Folder.
   In ZyRESULT, go to File > Print Result List.
   In ZyVIEW, click the Print button or go to File > Print.
   The Print Job Configuration dialog appears.
2. Click Setup to select another printer and specify the Paper and Orientation.
3. Click OK.
   You are back in the Print Job Configuration dialog.



4. Select the number of copies you want to print and if you want to collate the copies.

The controls are only enabled if the printer supports them. Printers that print to a file, such as Microsoft Office Document Writer and the ZyLAB TIFF Printer, do not support multiple copies.

5. Select which information you want to print before printing the actual document(s). Choose from

- Include banner page

  The banner page includes the query, index (name), user, date and time.
  You can also add a comment:
  - Click Setup.
  - Enter a comment.
  - Click OK.
  The comment will be placed beneath the query information on the banner page.

  To change one or more of the standard images, click Setup.
  Click Select (Top Right, Bottom Left or Bottom Right).
  Choose from:
  Browse (select another image),
  Default (keep the ZyLAB image) or
  None (no images will be included).
  Click OK to confirm.
  Once an image has been changed, it will become the default image.

  Click OK to return to the Print Job Configuration dialog.

- Include table of contents (not available via ZyVIEW)

  An extra page with a Table of Contents will be printed. By default, the ZyLAB logo will be printed Bottom Right. Another logo is possible, but will be the same as the logo on the banner page (Bottom Right).

- Include result list (not available via ZyVIEW)

  As shown in result list: printed as the document appears in the result list.
  Standard document properties: e.g. comment, file name, hit density, etc.
  Long descriptions: defined in Field editor, composed using the field definitions and document properties.

  If you want to change the logo on the result list, click Setup.
  Click Select, and choose from:
  Browse (select another image),
  Default (keep the ZyLAB image) or
  None (no images will be included).
  Click OK to confirm.
  Once an image has been changed, it will become the default image.

Click OK to return to the Print Job Configuration dialog.

- Number all pages (will only be printed on images and field pages)

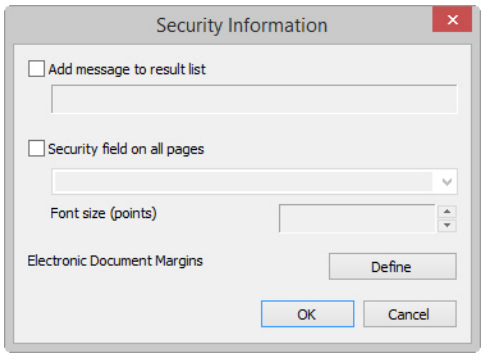
  If you are printing multiple documents and a table of contents, it is possible to number all pages consecutively and show these numbers in the table of contents. Note that with this option enabled only images will be printed and the page numbering is generated by the printing module and does not necessarily correspond to the original page numbering in the documents.

- Separate print job

  When printing very large amounts of data, it is possible to print in a batch to keep a certain order in your documents. Disable separate print jobs when you do not want to print all results as separate spool jobs, but as one single spool job.

6. Security Information

   To add security information to your printed document(s), select the Security Information button. The Security Information dialog appears.



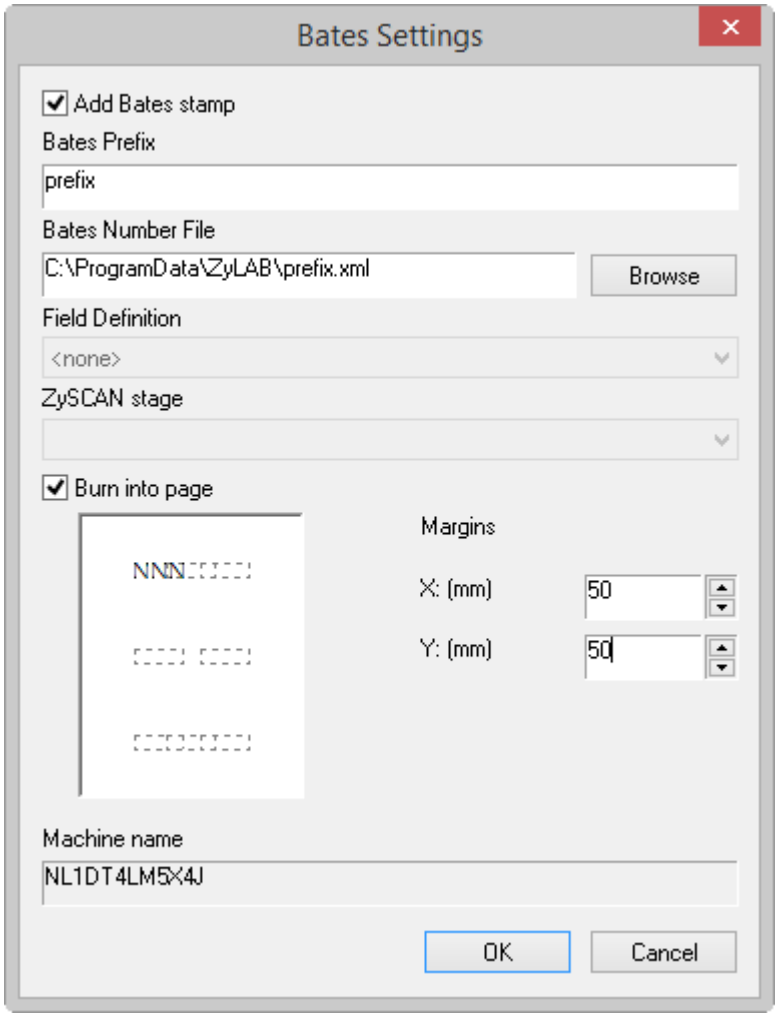
   - To add a message to the (printed) result list, select the checkbox Add message to result list. Define the message you want to add. For example, confidential.

   - To add a security field on all (printed) pages, select the checkbox Security field on all pages (Only for electronic documents). Select a field from the dropdown listbox. Define the Font size.

   - To define Electronic Document Margins, select the Define button. The Electronic Document Margin Settings dialog appears. Define the Text-based document margins. Define the Graphic document margins. Define the Margin text font size. Click OK.
   - Click OK.

7. Bates Stamping

   To add bates stamping to your printed document(s), select the Bates Stamping button. The Bates Settings dialog appears.
   For more information, see **Export document(s)** (page 110). The bates stamp(s) will be printed on the document(s).



8. In the Document settings box, you can specify which information should be printed for each selected document. For instance, it is possible to print a front page containing the document field values. It is possible to print a range of pages and to include the OCR text, etc. Choose from

- Fields and Margins
  - Select the checkbox Fields and Margins.
  - Choose a Style from the dropdown listbox.
  - To create, edit or delete a style, select the Define button. The Page Setup dialog appears.
  - To change the chosen style, select another one from the dropdown listbox.
  - To copy or delete a style, select the Define button. The Define Page Style dialog appears.
  - To copy a style, select it, and click the Copy button. Define a new name, and click OK.
  - To delete a style, select it, and click the Delete button.

  In the General tab, you can define whether you want
  - No extra fields on separate front page, or
  - All fields on separate front page

  And if you want to

- Include Annotations
- Print pages relevant to Annotations

In the Fields tab, select a position (left, center, or right) in the header or footer (or on the front page), and double click on a field.

In the Margins tab, define the
- Field information margins
In inches, the margins for Top, Left, Right, and Bottom can be set.
- Image layout
Choose from Fit image between margins, Fit image on total page, and Position and Scale.
- Print options
Define Orientation, Center image, Font and (de)select Enable word wrap in field texts.

- Print document (images / original format), and optionally select or define

  - *Include OCR text (no hits)*
  - *Print images as Tiff Group 3*
  - *Print Range*

- Print hits
  Hits are printed in white with a black background from the result list (ZyRESULT) and from the File View (ZyVIEW) using the File > Print menu. Using the Context Menu on the document (right mouse click) in the File View no attachments are printed and hits are displayed in yellow.
- Include attachments
  If you want to print (hits in) attachments and/or all nested messages, select **Include attachments**. This option is not available via File View (ZyVIEW). If the attachment is an image, the image is not resized to fit on the page, but the image will be printed on several pages.
  Printing of all nested messages within an e-mail
- Select the options as required:
  - Print page numbers
  - Print stamps
  - Print redactions. Also select the Exemptions (see Notes) and select/define Override redaction transparency.
  - Print raw text

9. Click OK.

Result

The (selected) document is printed.

Note

- If you print a document in ZyVIEW, you cannot include the Table of Contents and the result list.
- If you print document(s) in ZyFIND (Contents), you cannot print hits.
- If you want to hide attachments in the result list, use the following registry entry:

  Windows Registry Editor Version 5.00

  [HKEY_CURRENT_USER\Software\ZyLAB\ZyResult\Preferences]
  "HideEmailAttachments"="1"

  Only actual e-mails will be displayed, also when hits are found in the attachments.
- If you want to print classification text on the document, use the following registry entry:

  Windows Registry Editor Version 5.00

  [HKEY_LOCAL_MACHINE\SOFTWARE\ZyLAB\ZyRESULT\Preferences]
  "DocumentPrintSecurityField"="Classification"

  The value "Classification" can be changed, but must be the same as the field (name) created in the index with which it is linked. is the field name, in which the classification level will be specified. This field name can be changed. If you create an index, with the field "Classification", then the value in that field, will be printed.

  Classification text will be printed on documents and result list.
  Printing of classification text does not work on ZySCAN documents
- From the dropdown listbox Exemptions, select the position of the exemption code.
  - **Left aligned**. The exemption code appears in the left margin adjacent to the redaction, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
  - **Track redaction**. The exemption code appears in the redaction box itself, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
  - **Off**. The exemption code is not shown on the document. It only appears in the Exemption codes text box on the Edit Redaction dialog - Fields tab.

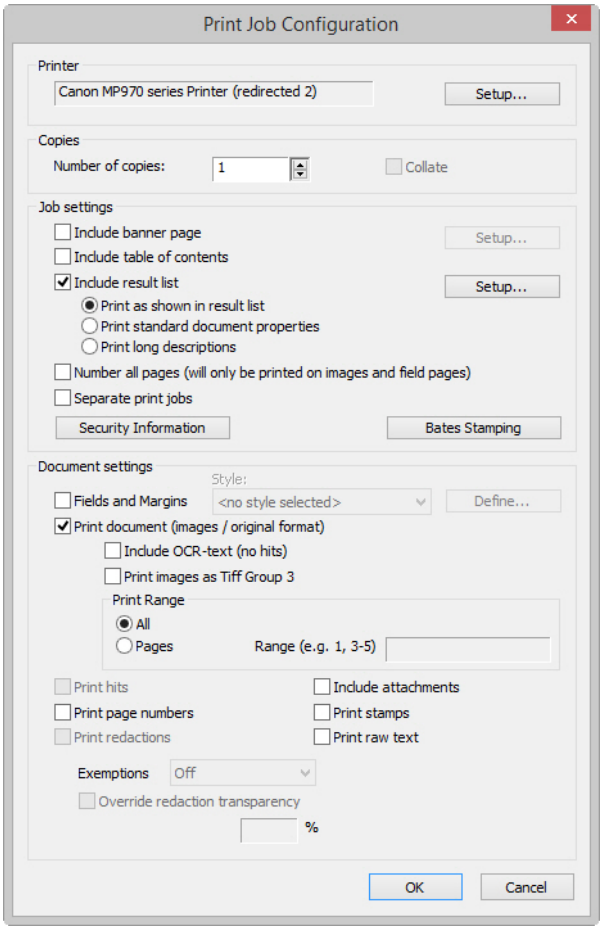
Security Information

Conditions

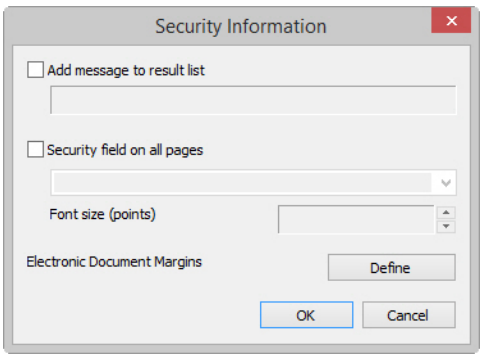
ZyFIND (Contents) or ZyRESULT or ZyVIEW is open. You want to add Security Information to your printed document(s).

Instructions

1. In ZyFIND (Contents) or ZyRESULT, select one or more documents, click the right mouse button and select Print Selected Documents.
   In ZyFIND (Contents), select a folder, right click and select Print Documents in Folder.
   In ZyRESULT, go to File > Print Result List.
   In ZyVIEW, click the Print button or go to File > Print.
   The Print Job Configuration dialog appears.



2. To add security information to your printed document(s), select the Security Information button.



3. To add a message to the (printed) result list, select the checkbox Add message to result list.
   - Define the message you want to add. For example, confidential.
4. To add a security field on all (printed) pages, select the checkbox Security field on all pages (Only for electronic documents).
   - Select a field from the dropdown listbox.
   - Define the Font size.
5. To define Electronic Document Margins, select the Define button. The Electronic Document Margin Settings dialog appears.

- Define the Text-based document margins.
- Define the Graphic document margins.
- Define the Margin text font size.
- Click OK.

6. Click OK.
7. For more information about the other settings, see Standard User Manual > Working with documents > Share > Print > **Print document(s)** (page 97).

Result

You have defined Security Information.

Fields and Margins

Conditions

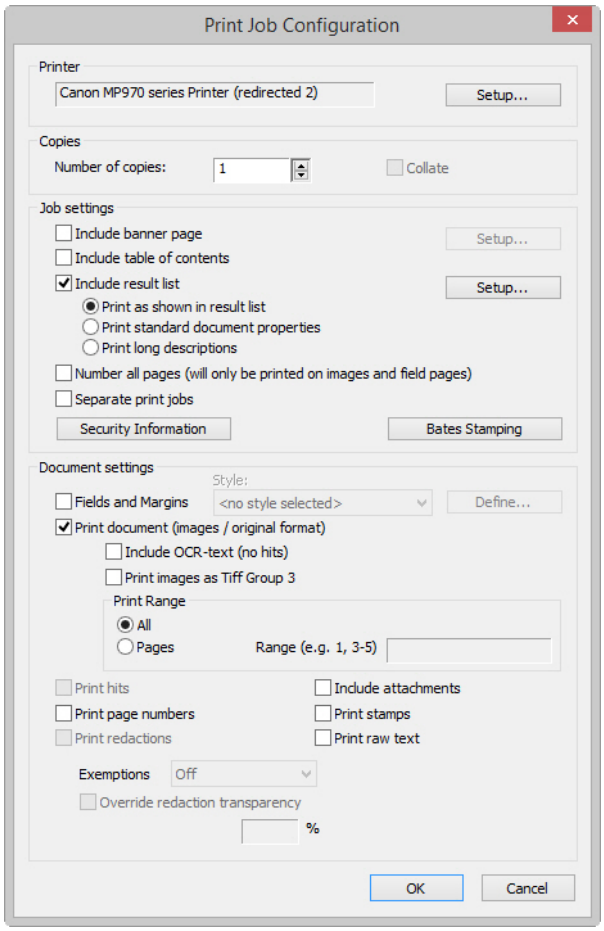
ZyFIND (Contents) or ZyRESULT or ZyVIEW is open. You want to choose, create, edit, or delete a printing style for fields and margins.

Instructions

1. In ZyFIND or ZyRESULT, select one or more documents.
2. In ZyFIND or ZyRESULT, click the right mouse button and select Print Selected Documents.

   Or

   In ZyVIEW, click the Print button: .
   The Print Job Configuration dialog appears.



3. Select the checkbox Fields and Margins.
4. Choose a Style from the dropdown listbox.

5. To create, edit or delete a style, select the Define button.
   The Page Setup dialog appears.
6. To change the chosen style, select another one from the dropdown listbox.
7. To copy or delete a style, select the Define button.
   The Define Page Style dialog appears.
   - To copy a style, select it, and click the Copy button. Define a new name, and click OK.
   - To delete a style, select it, and click the Delete button.
8. In the General tab, you can define whether you want
   - No extra fields on separate front page, or
   - All fields on separate front page

   And if you want to
   - Include Annotations
   - Print pages relevant to Annotations
9. In the Fields tab, select a position (left, center, or right) in the header or footer (or on the front page), and double click on a field.
10. In the Margins tab, define the
    - Field information margins
      In inches, the margins for Top, Left, Right, and Bottom can be set.
    - Image layout
      Choose from Fit image between margins, Fit image on total page, and Position and Scale.
    - Print options
      Define Orientation, Center image, Font and (de)select Enable word wrap in field texts.
11. For more information about the other settings, see Standard User Manual > Working with documents > Share > Print > **Print document(s)** (page 97).

Result

You have defined a printing style for fields and margins.

ZyRESULT/ZyVIEW - Mail document

Conditions

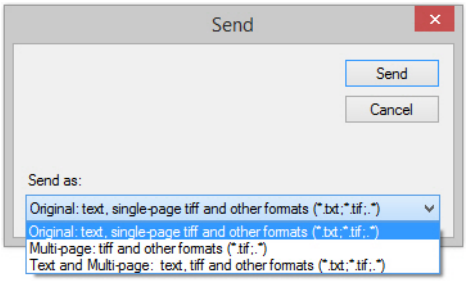
ZyRESULT or ZyVIEW is open.

Instructions

1. In ZyRESULT, select one or more documents. Click the right mouse button and select Send Selected Documents.

   Or

   In ZyVIEW, go to File > Send.
2. Specify how you want to send the document(s).


Send
Send
Cancel
Send as:
Original: text, single-page tiff and other formats (*.txt;*.tif;.*)
Original: text, single-page tiff and other formats (*.txt;*.tif;.*)
Multi-page: tiff and other formats (*.tif;.*)
Text and Multi-page: text, tiff and other formats (*.txt;*.tif;.*)

3. Click Send.
   A mail message, with the attached document(s) appears.
4. Specify to whom you want to send the document(s).
5. Click Send.

Result

You have mailed the document(s).

ZyRESULT - Share a result list

Conditions

ZyRESULT is open.

Instructions

1. Delete Reference(s) from the list that are not relevant or that were already communicated in other collections.
2. Store the Result list as a .zyr file (either on disk or in an email attachment).

Store on disk

1. Go to File > Save as.
2. Select a location.
3. Enter a file name
4. Click Save.

Store in an email attachment

1. Go to File > Sent To > Mail Recipient.
   A mail message, with the attached .zyr file appears.
2. Specify to whom you want to send the .zyr file.
3. Click Send.

Result

You have shared the Result list either by saving it on a shared location or by sending it to someone.

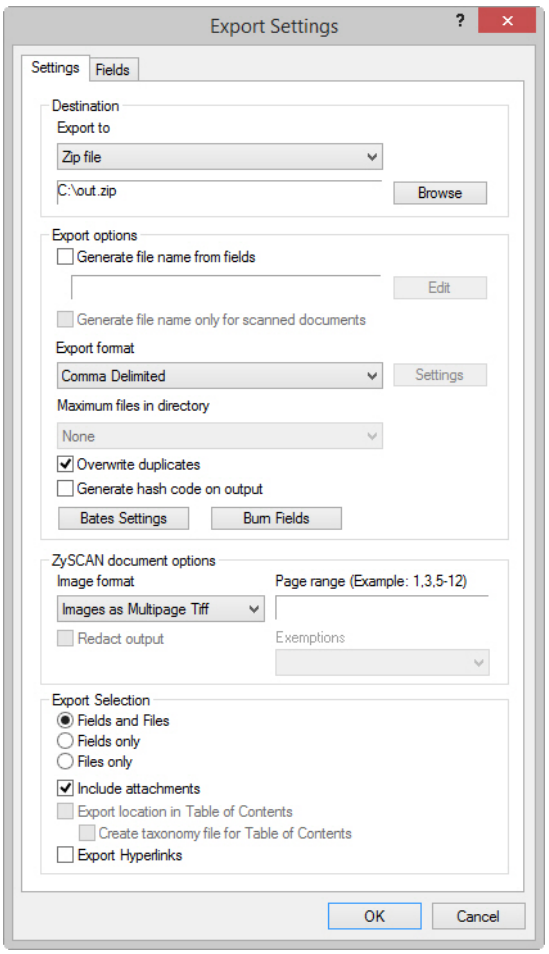
ZyRESULT/ZyVIEW/ZyALERT - Export document(s)

Conditions

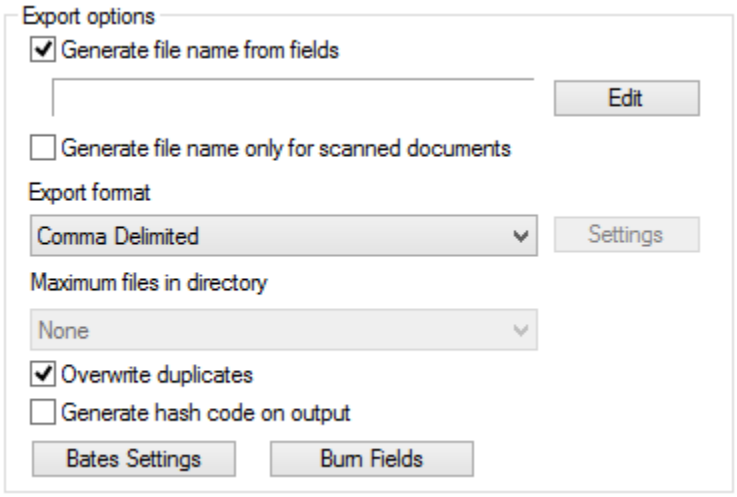
ZyRESULT/ZyVIEW/ZyALERT is open.

Instructions

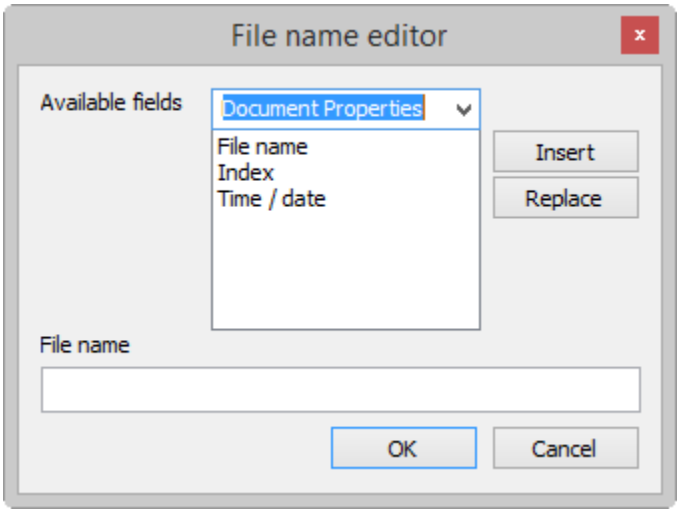
1. Select one or more document(s).
2. Go to menu File > Export, or click the right mouse button and select Export.
   The Export Settings dialog appears. The Settings tab is selected.



3. Select a destination to export the document(s) to. Choose from export to (another) index, (network or local) directory, (new or already existing) zip file, or export to email. Browse for the exact location.
4. If you want to generate new filenames for the exported documents from (a selection of) fields, select the checkbox Generate filename from fields.



- Click Edit.
  The Filename editor appears.

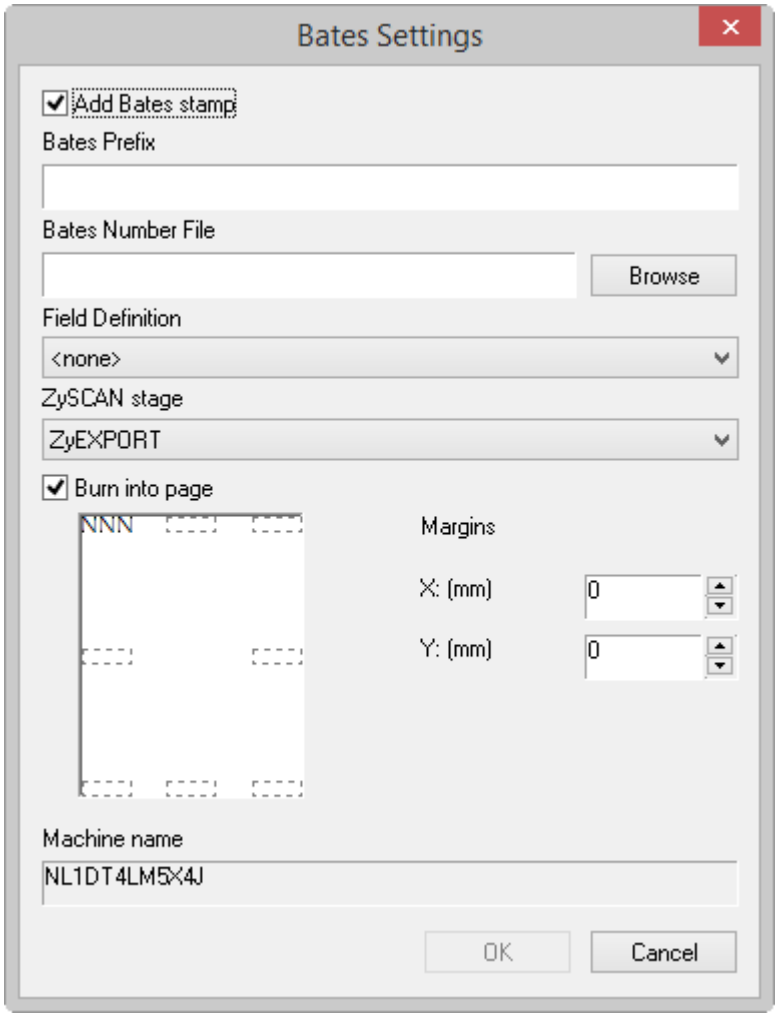


- Select a field that you want to include in the filename, and click the Insert button.
- Repeat to insert more fields.
- You can replace the entire Filename string by selecting a field, and clicking the Replace button.
- Click OK.

5. If only scanned documents should be named based on field information, select the checkbox Generate filename only for scanned documents.
6. Select an Export format. Choose from:
   - Comma Delimited
     Select this option to export data into comma delimited files. A comma delimited file is a data file, in which data items are separated by commas to facilitate the transfer of data to another program.
   - Excel
     Select this option to export data into an XLS file (Microsoft® Excel).

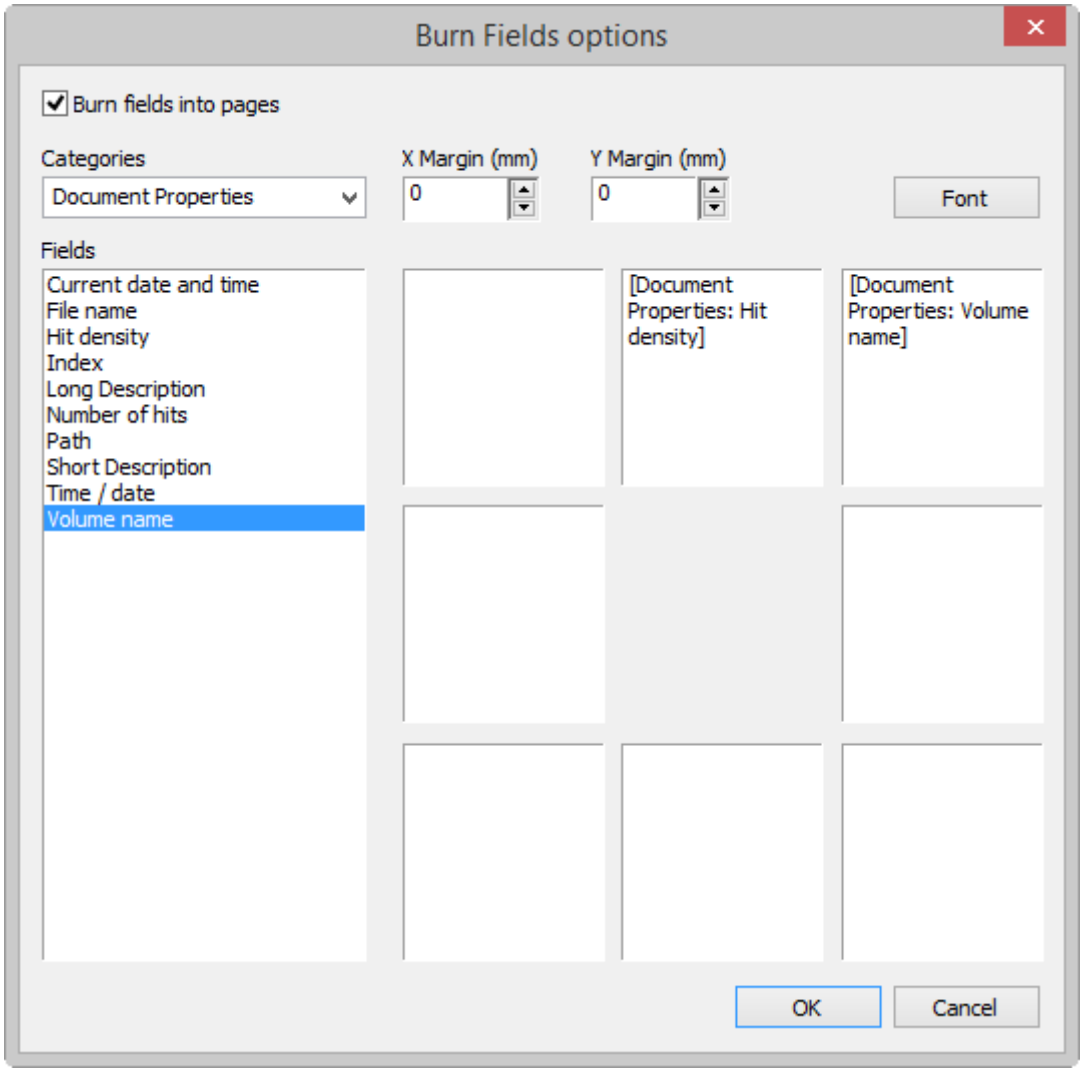
- Original
  Select this option to export data in the original format.
- Xml
  Select this option to export (field) data into an XML file, which explicitly describes content, structure, properties and formatting.
- Tiff and Xml
  Select this option to export documents as Tiff. The export includes an XML meta file.

7. If you selected the Tiff and Xml Export Format, click the Settings button.
   The ZyLAB Tiff Export Properties dialog appears.
   - In the Device Settings tab, you can define the Paper size, Force FAX resolution, Orientation, and Graphic Resolution to which the documents must be exported. For more information, see Device Settings.
   - In the File Formats tab, you can define the File format, Color Depth, Options, TIFF Options, and Photo Quality to which the documents must be exported. For more information, see File Formats.
   - In the Watermark tab, you can define how the watermark should be printed with Watermark options (Portrait pages and/or Landscape pages). For more information, see Watermark.
   - In the Embed Annotation tab, you can define how an annotation should be embedded with general settings, and Annotation position. For more information, see Embed Annotation.
   - In the Profile Manager tab, you can select and manage different profiles for printer settings. For more information, see Profile Manager.
8. Select the Maximum files in directory.
9. If you do **not** want to overwrite files which are using the same file name (in different folders), deselect the checkbox Overwrite duplicates. By default, the checkbox is selected.
10. If you want to be able to prove the authenticity of exported (fields) file(s), select 'Generate hash code on output'. The file(s) (and/or fields file(s)) are exported, with the accompanying hash code. For more information, see **ZyResult/ZyView - Export Settings - Generate hash code on output** (page 119).
11. To include bates stamps in the exported document(s), select the Bates Settings button.
    The Bates Settings dialog appears.



- Select the checkbox Add Bates stamp.
- Define a Bates Prefix. This can be any text. A sequential Bates number is added to the prefix.
- Give a name to the Bates Number File, or browse to the location of the file you want to use.
- If you want the Bates number to appear in a field, select a field definition from the drop-down list. This option is not always available.
- Select the ZySCAN stage you want the Bates stamping to occur. This option is not always available.
- If you want the Bates numbers to be permanently added to the pages check the *Burn into page* checkbox. The X and Y measurements are the distances from the bottom left corner of the page. Or select the location where the bates stamp should be placed.
- Click OK.

12. To include fields in the exported document(s), select the Burn Fields button.
    The Burn Fields options dialog appears.

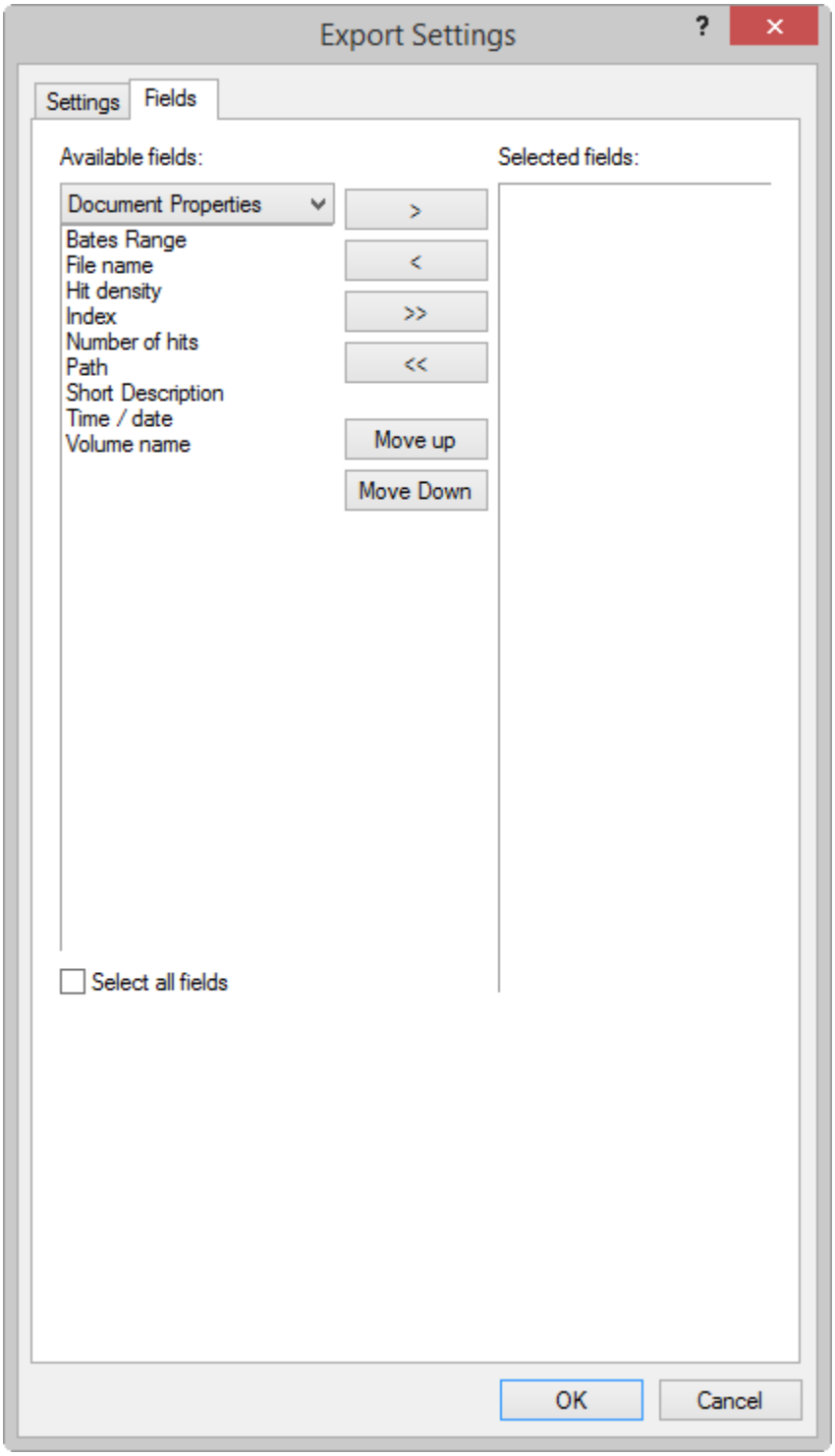


- Make sure the Burn fields into pages checkbox is selected, if you want to 'stamp' the value of a selected key field on the images of the exported document.
- Select a category (index key fields or document properties).
- Define the X and Y margin to determine the exact location or select a location and double click on the field you want to place there.
- To select a font, select the Font button.
- Click OK.

13. Select the Image format and Page range.
14. To export redactions, select the Redact output checkbox.
15. From the dropdown listbox Exemptions, select the position of the exemption code.
    - **Left aligned**. The exemption code appears in the left margin adjacent to the redaction, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.
    - **Track redaction**. The exemption code appears in the redaction box itself, and in the Exemption codes text box on the Edit Redaction dialog - Fields tab.

- **Off**. The exemption code is not shown on the document. It only appears in the Exemption codes text box on the Edit Redaction dialog - Fields tab.

16. Select an Export Selection.
    - Select Fields and Files, Fields only, or Files only.
    - If you want to include attachments, select that option.
    - If you want to export the location in Table of Contents, select that option.
      Optionally, select Create taxonomy file for Table of Contents.
    - If you want to export Hyperlinks, select that option.
17. If you selected 'Fields and Files' or 'Fields only' as the Export Selection, select the Fields tab.
    To manually select fields, deselect the Select all fields checkbox.



18. Select the fields you want to export, and include them using the arrows.
19. Click OK.

Result

You have exported document(s).

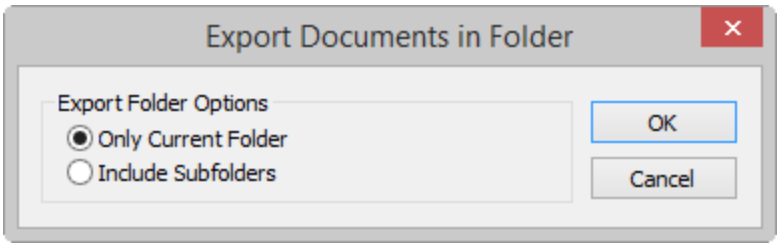
ZyFIND - Export TOC and documents

Conditions

You want to export the Table of Contents (including documents, hyperlinks and the location in the TOC) to, for example, another index.

Instructions

1. Go to ZyFIND > Contents.
2. Select the TOC folder you want to export.
3. Click your right mouse button, and select Export document in folder.
   The Export documents in Folder dialog appears.



4. Select if you want to export only the current folder, or if you want to include subfolders.
5. Click OK.
   The Export Settings dialog appears.
6. If you want to export to another index, browse for the correct index.
7. Define if you want to export the location (of the documents) in the Table of Contents.
8. Define if you want to export hyperlinks.
9. Click OK.

Result

You have exported the TOC (and documents) of an index to another index.

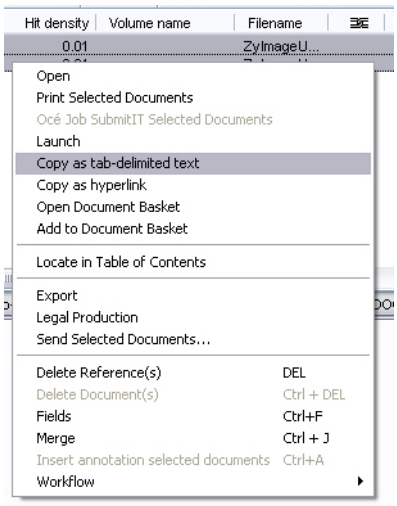
ZyRESULT - Report result list statistics

Conditions

ZyRESULT is open.

Instructions

1. Select one or more document(s) (reference(s)) in the list.
2. Click the right mouse button.
3. Select "Copy as tab-delimited text".

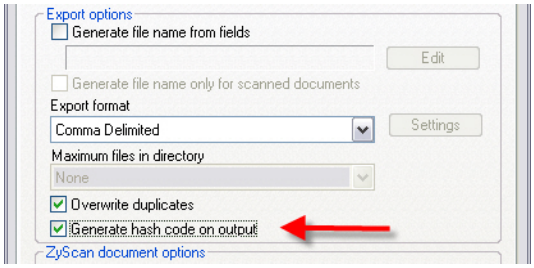


4. Open a spreadsheet program, for example Microsoft Excel.
5. Paste the copied text into your spreadsheet.
   The items from the different columns will be pasted separately.
6. Use the spreadsheet functions to work with the data and to save and print the report.

Result

You have created a report based on the result list statistics, i.e. which files contain certain words or what is the total size of all files containing a particular subject.

ZyResult/ZyView - Export Settings - Generate hash code on output



If you want to be able to prove the authenticity of an exported (fields) file, go to File > Export and select the option 'Generate hash code on output'. Fill out the other settings, and click OK. The file (and/or fields) is exported, with the accompanying hash code. The hash code for exported files is based on a hash code calculation of the original document in the index.

If you are exporting several (fields) files, a separate hash code is created for each file. All hash codes are summarized in one text (txt) file. The name of this text file consists of the hash code which is calculated based on all collected hash codes (without the filepaths). This hash code summary text file enables you to prove the authenticity of a set of (exported) files at once.

What is a hash code?

Hash codes are used to prove the authenticity of files. A hash code is a string, presented as 40 hex characters:

<field id="hashcode">1004046B52575F85AF065E24594271B63B0E92D2</field>

This hash code is calculated based on the contents of a text (txt/XML/PDF/etc.) or an image (TIFF) file.

The hash code is based on the Secure Hash Standard. In this standard, the SHA-1 (Secure Hash Algorithm-1) is specified. This Secure Hash Algorithm-1 is designed to ensure that it is impossible to find two different files which produce the same hash code. This means that you can use this code to prove the authenticity of your files.

Therefore if you want to share your files and want to have the possibility to prove that everyone is using the same file and no changes are made, you are advised to add hash codes to your files.

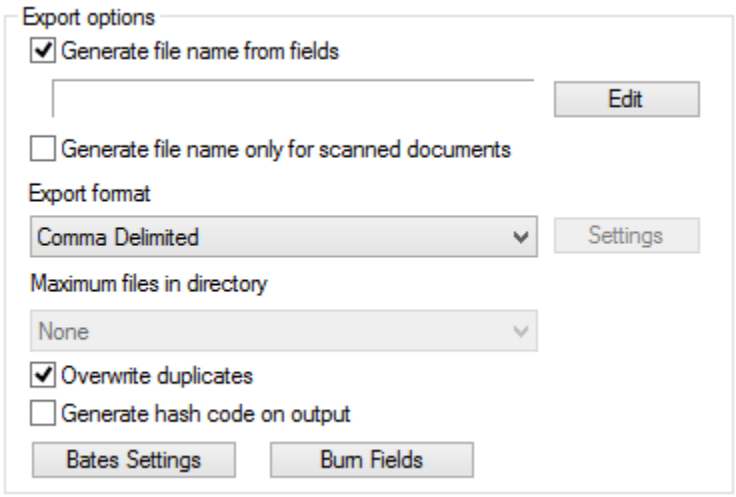
ZyRESULT/ZyVIEW - Export: Generate filename from fields

Conditions

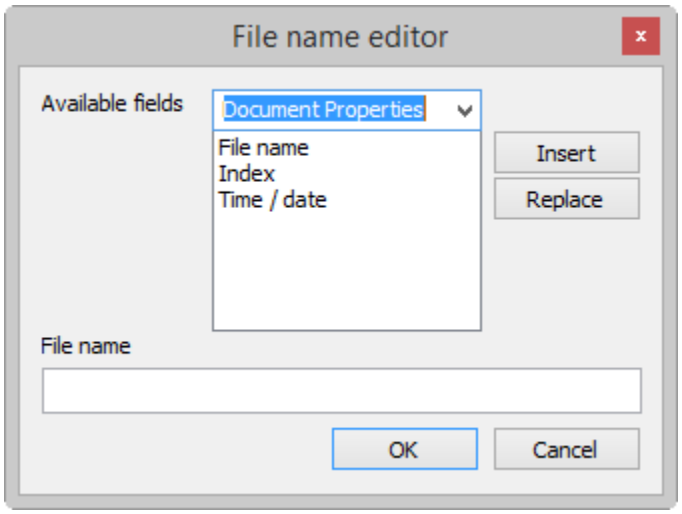
You want to generate new filenames for the exported documents from (a selection of) fields.

Instructions

1. In ZyRESULT or ZyVIEW, go to File > Export.
   The Export Settings dialog appears.
2. In the box Export Options, select the checkbox Generate filename from fields.



3. Click Edit.
   The Filename editor appears.



4. Select a field that you want to include in the filename, and click the Insert button.
5. Repeat step 4 to insert more fields.
6. You can replace the entire File name string by selecting a field, and clicking the Replace button.

7. Click OK.
8. If only scanned documents should be named based on field information, select the checkbox Generate filename only for scanned documents.
9. For more information about the other settings, see Working with documents > Share > **Export document(s)** (page 110).

Result

You have defined how new filenames are created for exported documents from field information.

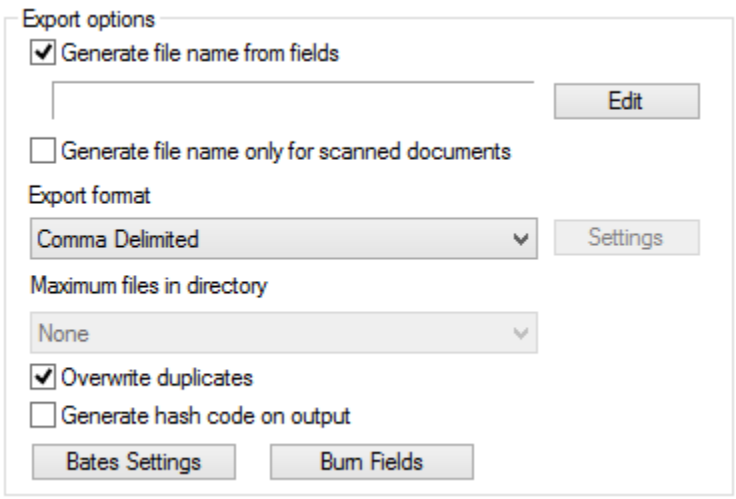
ZyRESULT/ZyVIEW - Export: Overwrite Duplicates

Conditions

You do (or do not) want to overwrite files which are using the same file name (in different folders).

Instructions

1. In ZyRESULT, ZyVIEW, go to File > Export.
   The Export Settings dialog appears.
2. In the box Export Options, (de)select the checkbox Overwrite duplicates.
   By default, the checkbox is selected.



3. For more information about the other settings, see Standard User Manual > Working with documents > Share > **Export document(s)** (page 110).

Result

You have defined whether you do or do not want to overwrite duplicates (in different folders).